TOP BRANDS

Nationwide DSN Report

National labels are wielding more power at America's discounters than ever before.

Branded assortments have grown in each of 17 key departments studied at discount department stores this year.

Moreover, 65% of discount store managers polled across the U.S. agreed that national brands will contribute more to store volume growth than private labels or store brands.

These results are part of *Discount Store News*' third annual Top Brands Study, which was conducted for *DSN* by Leo J. Shapiro & Associates, Chicago. A total of 341 store managers from such chains as K mart, Wal-Mart, Zayre and Target were polled in the nationally projectable study.

Managers at both conventional and upscale-format discount chains said more of their store inventories are being converted to national brands. Indeed, 48% of the discounters surveyed said their name brand assortments had increased during the past 12 months.

Findings showed that discounters expanded branded assortments most often in the housewares, ladies' and men's apparel, and health & beauty aids departments.

The appearance by housewares at the head of the list—with 22% of managers citing brand growth there—reflects discounter efforts to upgrade assortments in some categories, elevate margins and improve the department's fashion appeal.

Predictably, conventional discounters spoke of housewares brand growth more often, as they try to catch up the fashion stance of upscalers.

Apparel's high placement was also somewhat expected, given discounters' ongoing efforts to build the presence of labels in this high-image, high-margin department. In comparison, many hard lines departments are filled with a mature mix of brands.

Like housewares, ladies' apparel is also marked by more perceived brand growth at conventional chains than upscalers. However, upscalers indicated the greatest brand growth in men's wear.

Conventional managers also exceeded upscalers by a visible margin when naming H&BA as a department where brand assortment is climbing. Conventional discounters saw this occurring 17% of the time, compared with 12% at upscalers.

Cosmetics and hardware were the only other two departments to experience significant name brand growth.

Neither current inventory changes nor manager perceptions throughout the survey are uniform. As findings show, they vary by store location, size, volume and product category.

Overall, the trend to expand national brands appears to have more steam at traditional chains than upscalers. The upscalers, it appears, are already nearer where they want to be in brand-name representation.

That contrast is most evident when looking at responses from individual chains such as K mart and Target. At K mart, 82% of managers polled said they carried more branded merchandise today than a year ago. At Target, 45% of managers surveyed said the same.

Assortments of national brands also grew more rapidly at discount department stores in the 60,000-100,000-sq.-ft. and 100,000-plus-sq.-ft. size ranges than in smaller formats.

National Survey Reveals Store Managers' Top Brands

Housewares Rubbermaid Corning Anchor Hocking General Electric Ekco	**Hardware** Black & Decker Stanley Glidden General Electric Lucite
Consumer Electronics General Electric Panasonic Emerson Soundesign RCA	**Food/Candy/Snacks** Hershey Planters Mars Frito-Lay Brach's
Photo/Camera Kodak Polaroid Canon Minolta Fuji	**Toys** Fisher-Price Mattel Coleco Hasbro Playskool
Automotive Quaker State Pennzoil Fram STP Valvoline	**Stationery** Mead Bic Papermate Parker American Greetings
Sporting Goods Coleman Wilson Spalding Zebco Igloo	**Men's Apparel** Wrangler Lee Levi's Fruit of the Loom McGregor
Personal Care Conair Clairol Norelco General Electric Remington	**H&BA** Johnson & Johnson Revlon Procter & Gamble Clairol Crest
Ladies' Apparel Lee Wrangler Levi's Gitano Chic	**Children's Apparel** Garanimals Lee OshKosh Wrangler Healthtex
Cosmetics Maybelline Revlon Cover Girl Max Factor L'Oreal	**Domestics** Cannon St. Mary's J. P. Stevens Pepperell/West Point Burlington
Household Chemicals Procter & Gamble Tide Clorox Windex Lysol	Leading brands in 17 merchandise categories were named by store managers nationwide, in a poll conducted for DSN by Leo J. Shapiro & Associates.

Where Name Brands Are Growing

Department	All Discounters	Conventional Discounters	Upscale Discounters
Housewares	22%	23%	18%
Ladies' Apparel	18	19	15
Men's Apparel	16	14	20
H&BA	14	17	12
Cosmetics	9	12	3
Hardware	9	8	11
Consumer Electronics	6	5	8
Children's Apparel	5	4	6
Sporting Goods	5	5	4
Automotive	3	3	4

National labels made their greatest inroads this year in housewares, ladies' and men's apparel, according to a *DSN* survey of store managers. Of those polled, roughly 1 in 5 said branded stocks grew in these areas more than in any other department.

Source: DSN/Leo J. Shapiro & Associates

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Photo/Camera 97
Sporting Goods 95
Stationery 146
Toys 85

DSN's New Top Brands Survey Reflects Ongoing Mix Changes

(Continued from page 1)

On the other hand, change has been less dramatic in the food/candy/snacks department. Brands of chocolate, chips and nuts have consistently been managers' favorites, making it impossible for any soft drink, grocery or cookie and cracker brand to crack the top five.

Frito-Lay reappeared on this list after a one-year absence. It took the place of M & M, which is actually a manufacturer, not a brand. The M & M brand, Mars, held firmly in the third position which it first copped in 1984.

In personal care, the most apparent change has been the lower frequency of mention of General Electric as a top brand, from 48% and a No. 1 position in 1984 to 32% and a fourth spot in 1985.

More than anything, that seems to reflect the ongoing brand transition to Black & Decker.

Meanwhile, a trend to basic brands, and away from designer names, is apparent from survey findings in ladies' apparel.

Calvin Klein, Jordache and Sasson are no longer among managers' favorite five, as they were before 1985—when discounters stocked their shelves with these diverted brands. The department today remains dominated by such basic labels as Lee, Wrangler and Levi's.

Chic and Gitano, which have branded appeal and are distributed directly to discounters, have recently landed in the top five.

Brand loyalty in children's apparel is lower than in men's and ladies' wear, as measured by how frequently discounters cited specific top brands in this department.

The brand mentioned most often by managers, Garanimals, was named just 16% of the time in 1985—a frequency that would place it no better than fourth in ladies' apparel and fifth in men's wear.

Year-to-year comparisons within children's wear further illustrate the softness in brand loyalty here. As examples, Garanimals was named by 21% of managers polled in 1983 and 16% this year' Lee, the No. 2 brand, was named 21% of the time in 1983 and 14% this year; Wrangler mentions slipped from 17% in 1983 to 11% in 1985.

When managers named their top toy brands this year, Hasbro landed firmly in the top five for the first time.

The increased popularity of Hasbro is likely attributable to its purchase last year of Milton Bradley, and the continued sales strength of its Transformers line.

In photo/camera, the top four of Kodak, Polaroid, Canon and Minolta have shuttered the entry of other brands into leadership positions. The fifth spot has shifted this year from Pentax, a brand of 35mm cameras and accessories, to Fuji, a film brand.

The lock on leadership in hardware appears even stronger, with the Black & Decker and Stanley tandem swapping the Nos. 1 and 2 spots each year.

Glidden appeared as the fourth-leading hardware brand in 1983 and 1984, but rose to third this year, as its frequency of mention by managers climbed to 15% in

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Discounters Carrying More Brands
(% reporting growth in national brands carried)

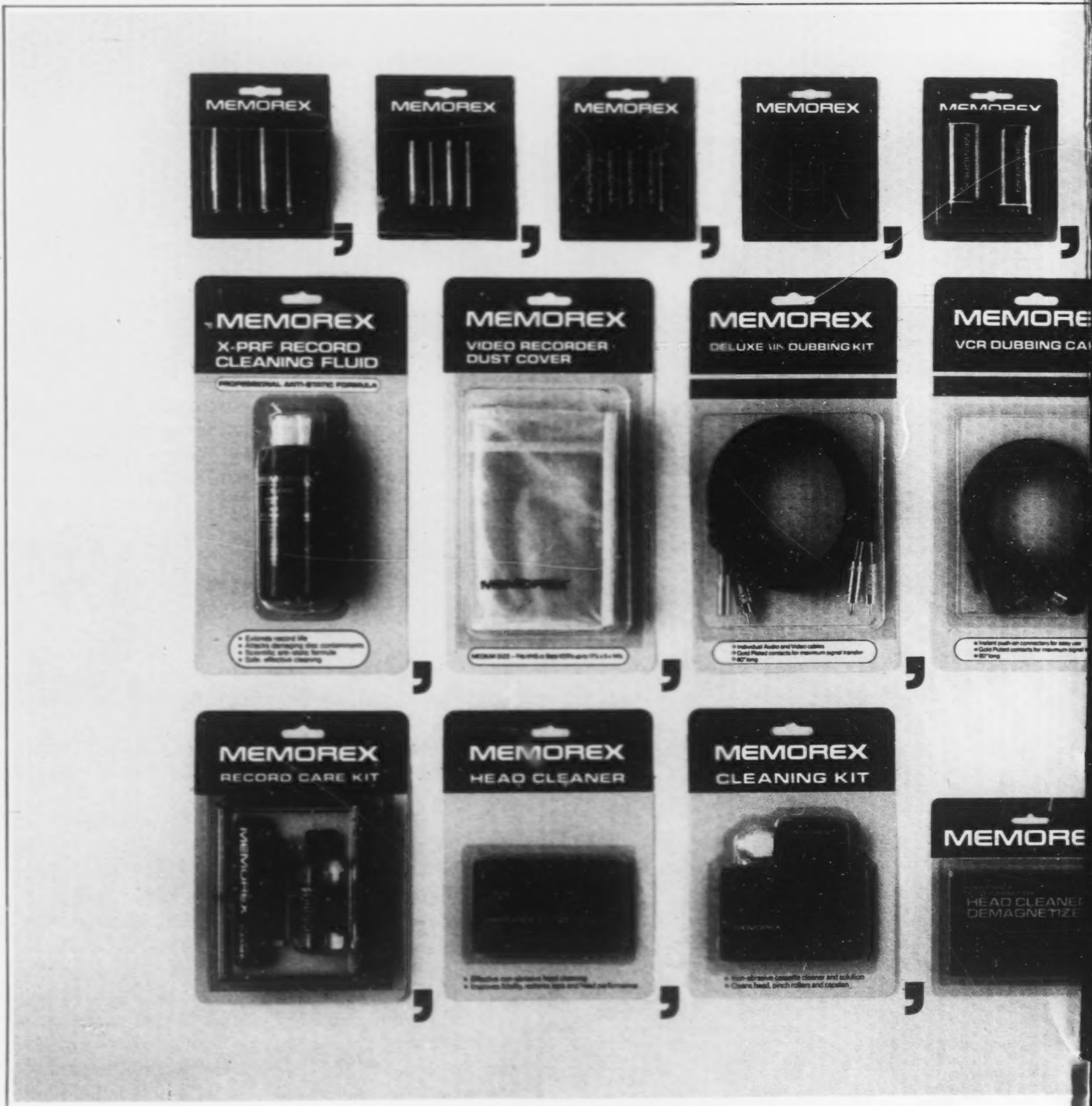
Growth	1985	1984	1983
Greater	48%	54%	61%
Same	49	43	36
Less	2	3	3
Not Answering	1	—	1

Source: DSN Research/Leo J. Shapiro & Associates

Where Name Brands Are Growing—All Discounters

Department	1985	1984	1983
Housewares	22%	22%	20%
Ladies' Apparel	18	22	26
Men's Apparel	16	21	23
Health & Beauty Aids	14	22	16
Cosmetics	9	—	8
Hardware	9	10	18
Consumer Electronics	6	7	8
Children's Apparel	5	5	7
Sporting Goods	5	0	8
Automotive	3	4	—

Source: DSN Research/Leo J. Shapiro & Associates



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Where Name Brands Are Growing—Conventional Discounters

Department	1985	1984	1983
Housewares	23%	22%	18%
Ladies' Apparel	19	23	25
Health & Beauty Aids	17	19	16
Men's Apparel	14	19	25
Cosmetics	12	—	10
Hardware	8	12	20
Consumer Electronics	5	6	8
Sporting Goods	5	7	7
Children's Apparel	4	5	5
Automotive	3	5	—

Source: DSN Research/Leo J. Shapiro & Associates

Where Name Brands Are Growing—Upscale Discounters

Department	1985	1984	1983
Men's Apparel	20%	27%	12%
Housewares	18	21	28
Ladies' Apparel	15	21	31
Health & Beauty Aids	12	34	15
Hardware	11	4	10
Children's Apparel	8	8	16
Consumer Electronics	8	10	8
Automotive	4	—	—
Sporting Goods	4	12	5
Cosmetics	3	—	—

Source: DSN Research/Leo J. Shapiro & Associates

New Survey

(Continued from page 82)

1985, up from 6% a year ago.

In housewares, the glassware brand Anchor Hocking cracked into the top five for the first time in 1985, when 17% of managers named it a top brand. That caused some shuffling among the Nos. 3, 4 and 5 brands, but left untouched the kings of the kitchen—Rubber-maid and Corning.

It's notable that for the first time this year, the Corning tableware brand, Corelle, wasn't among the top five named by managers. However, the Corning brand itself had more mentions in 1985, 21%, than in 1984, 18%.

Important Role

Ekco, in the fifth position in 1984 and tied for fourth in 1985, also was named more often as a top brand this year: 14% compared with 10%.

Brand growth continued at discounters, while managers expressed strong optimism over full-year 1985 sales prospects at their stores. A total of 44% of managers polled predicted double-digit sales gains in the current year.

They felt optimistic, despite the general softness in the economy, because they've seen merchandising changes being implemented in their stores. When asked if they saw merchandise quality and price points being uplifted, 38% said "yes."

Most often, they cited "clothing" (11%) as an area being upgraded. Following closely was the more specific reference to ladies' apparel (7.3%) and housewares (7%).

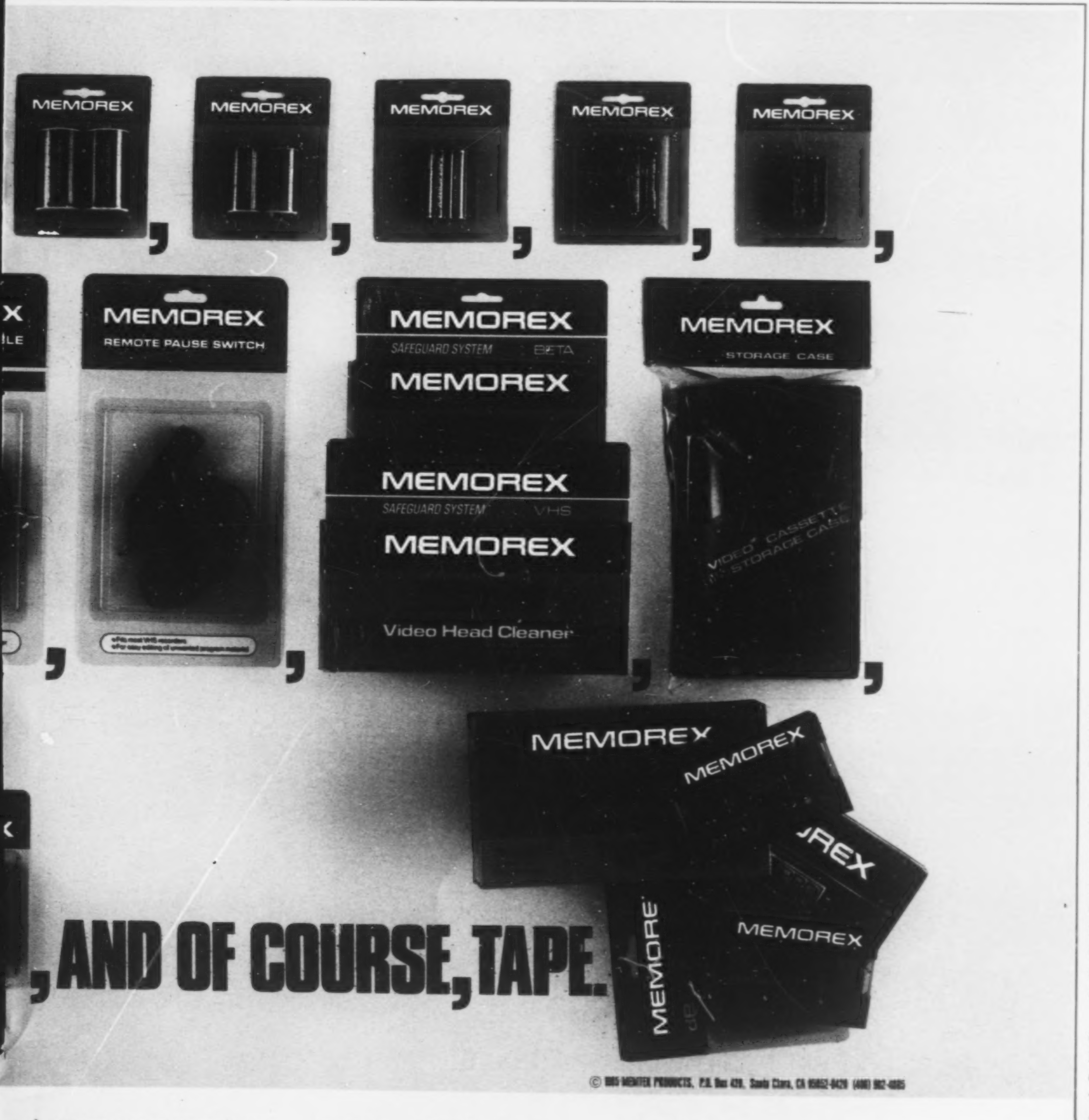
About 3% also cited such efforts in men's apparel, hardware, domestics, appliances, toy, consumer electronics and H&BA.

Figures Analyzed

More than half the store managers polled, 51.2%, also perceived that the number of sku's in their stores had risen during the past year. Only 19.3% felt that sku's had declined, while 25.7% observed no change.

When looking at where brands have grown the most, managers fairly consistently each year placed the same five departments at the head of the list: men's and ladies' apparel, housewares, health & beauty aids and hardware.

Such activity in apparel and housewares mostly reflects fashion efforts at discount department stores, where new brands, new styles and higher price points have been a recent rule. Indeed, these departments have kept the brand-growth lead among themselves throughout the three-year history of the top brands study.



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Fisher-Price Is No. 1; Mattel 2nd

Nationwide DSN Report

Fisher-Price headed this year's toys top brands list with citations by almost 7 out of 10 discount store managers.

Managers from upscale chains were even stronger in their support of Fisher-Price, maker of educational and preschool toys, with 80% mentioning the label as a top brand.

Following seven percentage points behind the leading brand, with mentions by 60% of those polled was Mattel. Although it fell only slightly behind Fisher-Price in its popularity in conventional discount stores, Mattel lagged far behind the No. 1 brand in upscale chains, where it was mentioned by 53% of managers surveyed.

Overall strength weakened considerably in the remaining eight on the top brands list. Although No. 3 on the list, Coleco was named by only 32% of discount store managers. Its popularity was greater though, in upscale chains, where it was mentioned by 44% of those polled. No doubt the continuing strength of Coleco's Cabbage Patch is augmenting this brand's popularity.

Both of the remaining top five brands, Hasbro and Playskool, were mentioned by 25% of store managers. However, while Hasbro won fairly consistent responses across the board, Playskool was considerably more popular in upscale chains than in conventional discount stores. The brand was cited by 38% of managers at upscale chains vs. 21% at traditional chains.

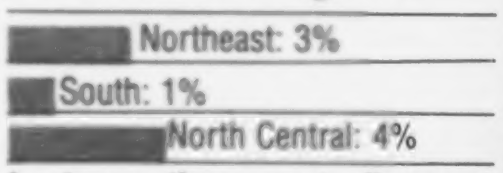
No. 6 on the list was Kenner, with mentions by 18% of store managers. Milton Bradley, No. 7, with 16% is the more popular of two board game brands on the list. The other is Parker Brothers, which took the No. 10 spot with 5%.

The remaining brands on the list include Tonka, No. 8, and Huffy, No. 9, which specializes in bicycles and ride-on toys.

Again, in the regional breakout the top two brands, Fisher-Price and Mattel, received much stronger responses than did the remaining top brands. However, in two regions—the South and

(Continued on page 92)

Growth Regions



In toys, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the North Central States—4%.

Source: DSN/*Leo J. Shapiro & Associates*

Toys

How Industry's Top 5 Fare at Chains

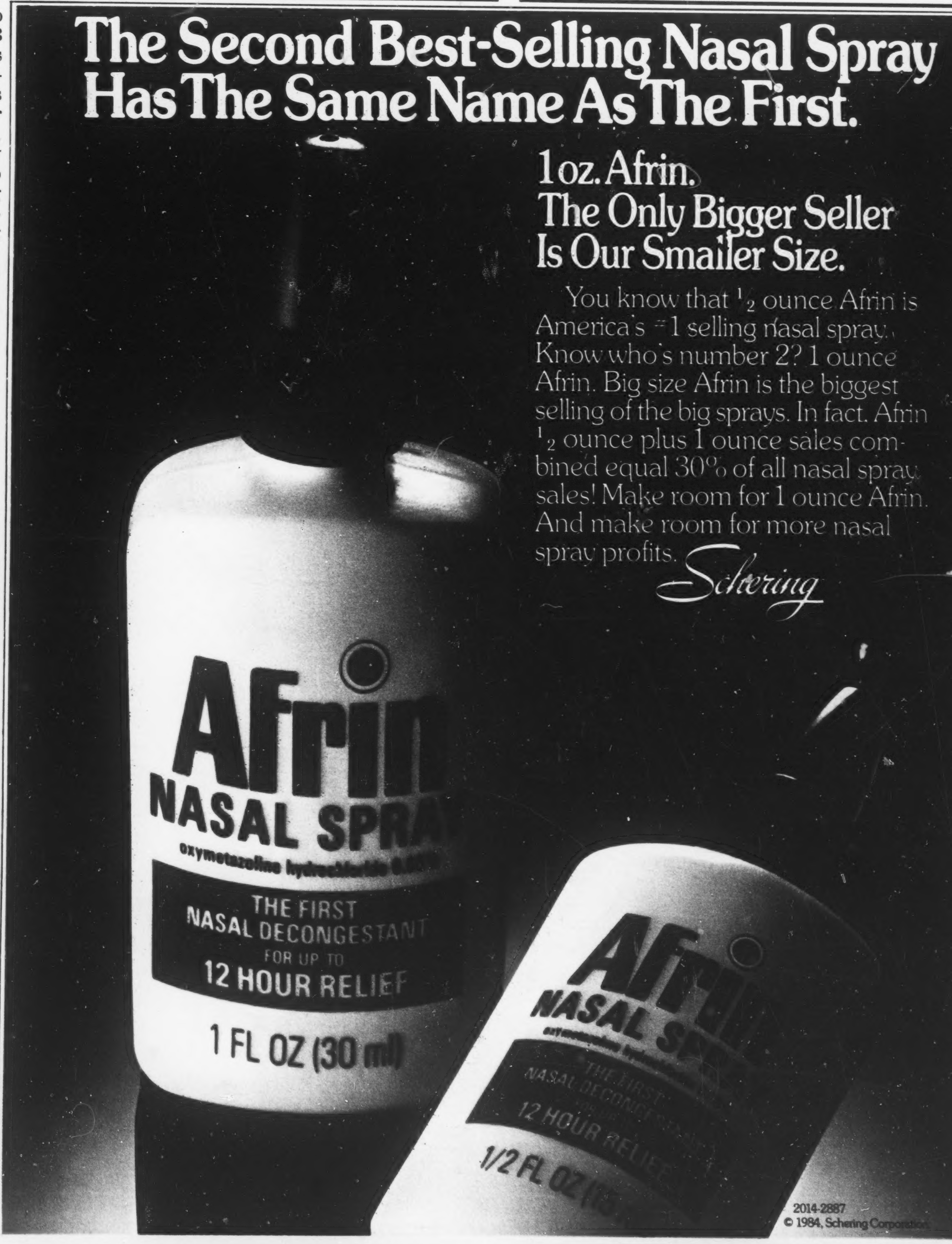
Brands	K mart	Wal-Mart	Zayre	Target
Fisher-Price	52%	63%	91%	79%
Mattel	62	61	41	59
Coleco	23	19	47	34
Hasbro	31	23	19	41
Playskool	28	20	48	32

Source: DSN/*Leo J. Shapiro & Associates*

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Fisher-Price	67%	62%	80%
Mattel	60	61	53
Coleco	32	29	44
Hasbro	25	24	26
Playskool	25	21	38
Kenner	18	18	17
Milton Bradley	16	18	15
Tonka	15	16	11
Huffy	6	7	2
Parker Brothers	5	5	7

Source: DSN/*Leo J. Shapiro & Associates*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TOYS/TOP BRANDS

Toys

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Fisher-Price	63%	57%	75%	74%
Mattel	42	61	51	87
Coleco	34	33	31	32
Hasbro	17	24	24	36
Playskool	27	16	36	19
Kenner	12	21	22	11
Milton Bradley	21	13	17	17
Tonka	10	12	22	13
Huffy	4	10	6	—
Parker Brothers	7	3	8	4

Source: DSN/*Leo J. Shapiro & Associates*

Continued consumer enthusiasm for Cabbage Patch has led to Coleco's mention by almost a third of store managers. At Clover, Lancaster, Pa., the dolls were available for the store's opening. *(DSN photo)*

Toys

(Continued from page 85)

the West—Mattel came out the top brand over Fisher-Price.

In the West, Mattel received a stronger regional response than any other brand, with mentions by 87% of managers. Mattel received citations by 74% of managers in that region.

In the South, 61% of managers cited Mattel vs. 57% for Fisher-Price.

However, in the Northeast, Fisher-Price was mentioned by 63% of managers, 21 percentage points above Mattel. In the North Central region the difference was even greater, with 75% of managers citing Fisher-Price vs. 51% for Mattel.

The strength of the remaining top five brands also varied by region, although here, the overall support was not as great as for the two leaders. Coleco took third place with 34%, in the Northeast and with 33% in the South. In the North Central region, Playskool, the No. 5 brand overall, was the third most popular brand with mentions by 36%. In the West, Hasbro, the No. 4 brand overall, was given third place with 36%.

The by-chain breakout revealed wide differences in brand strenth among K mart, Wal-Mart, Zayre and Target.

At Zayre, Fisher-Price won huge support with mentions by 91% of store managers—overshadowing even the considerable 79% of managers at Target who supported the brand. At Wal-Mart, Fisher-Price was given the nod by 63%, and at K mart by 52%.

With Mattel, brand strength was fairly consistent among K mart, Wal-Mart and Target.

CONSUMER ELECTRONICS/TOP BRANDS

3 Brands Score, None by Huge Margins

Nationwide DSN Report

Discounters were most tuned into General Electric, Panasonic and Emerson as their top consumer electronics brands, according to survey findings.

But all of the top 10 department brands scored double-dig-it ratings, reflecting the fact that there are no runaway favorites in consumer electronics.

Even the top brand, General Electric, was mentioned by fewer than half of managers polled. G.E. was cited by 40% of all discounters surveyed, but had considerably stronger support among managers at conventional chains. They named the brand 43% of the time, compared with 30% at upscalers.

Indeed, G.E. fared best by a wide margin at conventional chains, but was rated third by upscalers, behind Panasonic and Magnavox.

Panasonic, the No. 2 brand overall at 32%, found most of its support at upscalers, who named it four times in 10; fewer than 3 in 10 at conventional chains named the brand.

Emerson and Soundesign, the third- and fourth-leading brands among discounters polled, had equivalent support from managers at conventional and upscale chains. So did Commodore, which placed seventh, at 15%.

However, the rest of the brands on the list couldn't enjoy such a consensus. For instance RCA was favored by 23% of managers at conventional discount chains, but just 7% of upscalers. That was enough to place the brand fifth, at 19%.

Sony, the No. 6 brand overall, at 16%, was cited by 28% of upscalers, who considered it to be their fourth-leading brand. However, just 13% of conventional managers named Sony.

Sanyo and Magnavox found most of their favor at upscalers, who mentioned them in high frequency. Magnavox, No. 9 overall, was the second-leading consumer electronics brand at upscalers, at 34%. Sanyo, the No. 8 brand overall, was cited by 25% of managers at upscale chains. Both measures were far greater than these brands received among managers at conven-

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Consumer Electronics

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
General Electric	40%	43%	30%
Panasonic	32	28	40
Emerson	26	26	24
Soundesign	20	21	19
RCA	19	23	7
Sony	16	13	28
Commodore	15	16	16
Sanyo	13	7	25
Magnavox	12	3	34
Gold Star	10	13	—

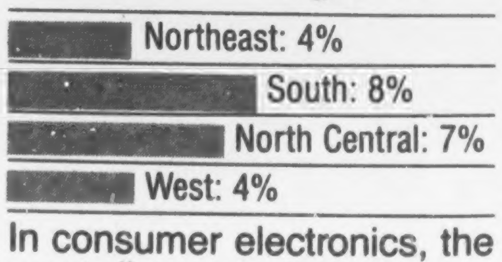
Source: DSN/*Leo J. Shapiro & Associates*

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
General Electric	59%	18%	20%	21%
Panasonic	29	42	3	64
Emerson	11	44	60	27
Soundesign	28	27	9	29
RCA	44	66	—	4

Source: DSN/*Leo J. Shapiro & Associates*

Growth Regions



In consumer electronics, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the South—8%.

Source: DSN/*Leo J. Shapiro & Associates*

CONSUMER ELECTRONICS/TOP BRANDS

Brand Support Varies Widely by Region

(Continued from page 92)

tional chains.

Conversely, Gold Star, which rounds out the top 10 list, was cited by 13% of conventional managers, but virtually no upscalers.

The range of opinions about which brands are best in consumer electronics varied greatly among managers at leading chains. Managers polled at each of four leading discounters—K mart, Wal-Mart, Zayre and Target—named different brands as their best.

K mart managers gave the nod to General Electric, at 59%; Wal-Mart managers favored RCA, at 66%; Zayre managers preferred Emerson, at 60%; Target managers named Panasonic most often, 64% of the time.

The lack of consensus at major chains underscores the different brands used by discounters to position their consumer electronics departments. The appearance of just one computer brand on the top 10 list, Commodore, reflects discounters' middling performance in selling computerware.

None of the top brands fared well at all of the top chains studied. For instance, General Electric was named by 59% of K mart managers, but only about 20% at the other three chains. Panasonic was most favored at Target, 64%, but was a distant third at Wal-Mart and K mart, and had minimal support at Zayre.

Emerson was named most often by Zayre managers, and was the second-favored brand at Wal-Mart, but slipped elsewhere. Soundesign was rated consistently at most.

RCA won Wal-Mart and placed second at K mart, but support at Target and Zayre was nominal.

Support for particular brands also varied widely on a regional basis. General Electric and Panasonic had the most balanced ratings across the country, but many others among the top 10 didn't share such universal acclaim.

Consumer Electronics

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
General Electric	35%	36%	39%	51%
Panasonic	35	32	33	27
Emerson	29	34	29	7
Soundesign	9	23	28	13
RCA	14	23	19	16
Sony	15	15	20	13
Commodore	10	14	17	18
Sanyo	20	8	13	13
Magnavox	6	10	25	—
Gold Star	9	14	10	6

Source: DSN/Leo J. Shapiro & Associates

PORTABLES
VIDEO RECORDERS
249

The popularity of boom boxes, rack stereo systems and televisions contributed to managers' high brand ratings of General Electric, Panasonic and Emerson. Nichols, Hagerstown, Md., stocks these key classifications. *(DSN photo)*

SPORTING GOODS/TOP BRANDS

Outdoor Equipment Lands 6 of Top 10

Nationwide DSN Report

Sporting goods merchants are being lured by the great outdoors.

A dominant 6 out of 10 positions on sporting goods' top brands list were copped by brands of outdoor and recreational equipment for fishing, camping and hunting. Team equipment and apparel brands completed the list of favored sporting goods among discount store managers surveyed nationwide.

Coleman blazed the trail among all brands, and led the group of outdoors brands by a wide margin. Discount store managers overall named Coleman 43% of the time, and was favored slightly more by upscalers.

Wilson, the No. 2 brand overall, was cited by 34% of managers, and was the only brand to rival Coleman's popularity among managers at upscale stores. Wilson came in a close second at upscalers, by a 49% to 47% margin, but was a more distant runner-up among managers at conventional stores.

Spalding, the No. 3 brand among managers surveyed, trailed Wilson only slightly at conventional stores, 28% to 25%, but was a far more distant third among upscalers, 47% to 28%.

Outdoor brands captured five of the remaining seven top brands positions, ranging in total mentions from 8%-17% among all discount store managers polled. Three of these were fishing tackle brands.

Zebco, at 17% and the No. 4 brand overall, led this group. Zebco was favored almost twice as much by managers at conventional discounters, 19%, than upscalers, 11%.

Also scaling the top brands list were the fishing tackle brands Daiwa, No. 6 overall, and Garcia, No. 10. Among all managers polled, 13% cited Daiwa as a top brand, and 8% cited Garcia. For both brands, support among conventional chains and upscalers were fairly balanced.

Igloo and Remington, the No. 5 and 7 brands in the overall perception of discount sporting goods merchants, are the other outdoors brands most favored by managers polled. Igloo was named by more upscalers, 19%, than conven-

(Continued on page 99)

Sporting Goods

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Coleman	43%	42%	49%
Wilson	34	28	47
Spalding	26	25	28
Zebco	17	19	11
Igloo	15	15	19
Daiwa	13	13	12
Remington	11	15	6
Diversified	10	5	21
MacGregor	9	12	3
Garcia	8	9	5

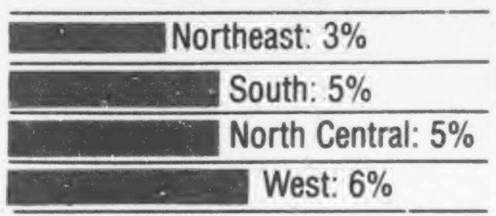
Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Coleman	22%	43%	45%	38%
Wilson	23	10	77	47
Spalding	23	14	63	26
Zebco	11	56	3	6
Igloo	11	23	3	18

Source: DSN/Leo J. Shapiro & Associates

Growth Regions



In sporting goods, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the West—6%.

Source: DSN/Leo J. Shapiro & Associates

Kodak, Followed by Polaroid, in Lead

Nationwide DSN Report

When discounters speak of their favored photo brands, they focus most sharply on Kodak.

The familiar brand of easy-to-use cameras, film and darkroom supplies was named the top department brand by 88% of discount managers polled. Conventional chain managers named Kodak 89% of the time, slightly more than upscalers' 84% level of mention.

No other photo brand came close, but Polaroid came closest. The instant film and camera brand, No. 2 overall in the opinion of discounters polled, was considered a top brand by 48% of managers. Slightly more than half at conventional chains named Polaroid, providing its strongest base of support.

In the third position, Canon led the pack of 35mm camera brands on the top 10 list—including Minolta, Nikon, Pentax and Olympus.

Although Kodak as a single brand dominated the list, the diversity of classifications on the top brands list underscored the department's broad-based sales draw. Camera brands on the list include point and shoot, instant, rangefinder and single lens reflex types. Film, battery and accessories brands also were represented.

Minolta, which rated fourth overall at 29%, came closest to overtaking Canon at conventional stores, where managers named it a top brand 28% of the time. Even though Minolta was cited by more upscalers, 34%, Canon was also more popular here.

Indeed, Canon was the second-leading brand at upscalers, who named it 50% of the time.

Together, Canon and Minolta far outdistanced other brands of sophisticated cameras. Nikon achieved its 8% overall rating because 22% of upscalers cited it, but only 3% of conventional managers. Pentax was cited a top brand by just 6% of discounters polled. Olympus was considered a favorite by 4%.

Fuji, a film brand that competes with Kodak, snapped up the No. 5 brand position, as 11% of managers

(Continued on page 98)

Photo, Camera

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Kodak	88%	89%	84%
Polaroid	48	52	37
Canon	36	31	50
Minolta	29	28	34
Fuji	11	12	9
Nikon	8	3	22
Pentax	6	4	10
Continental	4	5	—
Olympus	4	4	3
Duracell	3	3	3

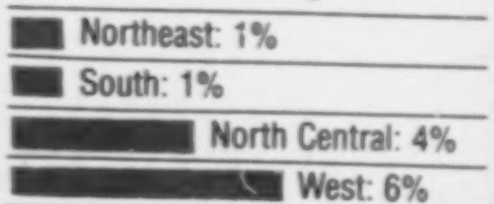
Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Kodak	92%	94%	97%	90%
Polaroid	44	59	77	36
Canon	44	35	—	28
Minolta	69	13	21	23
Fuji	19	31	—	2

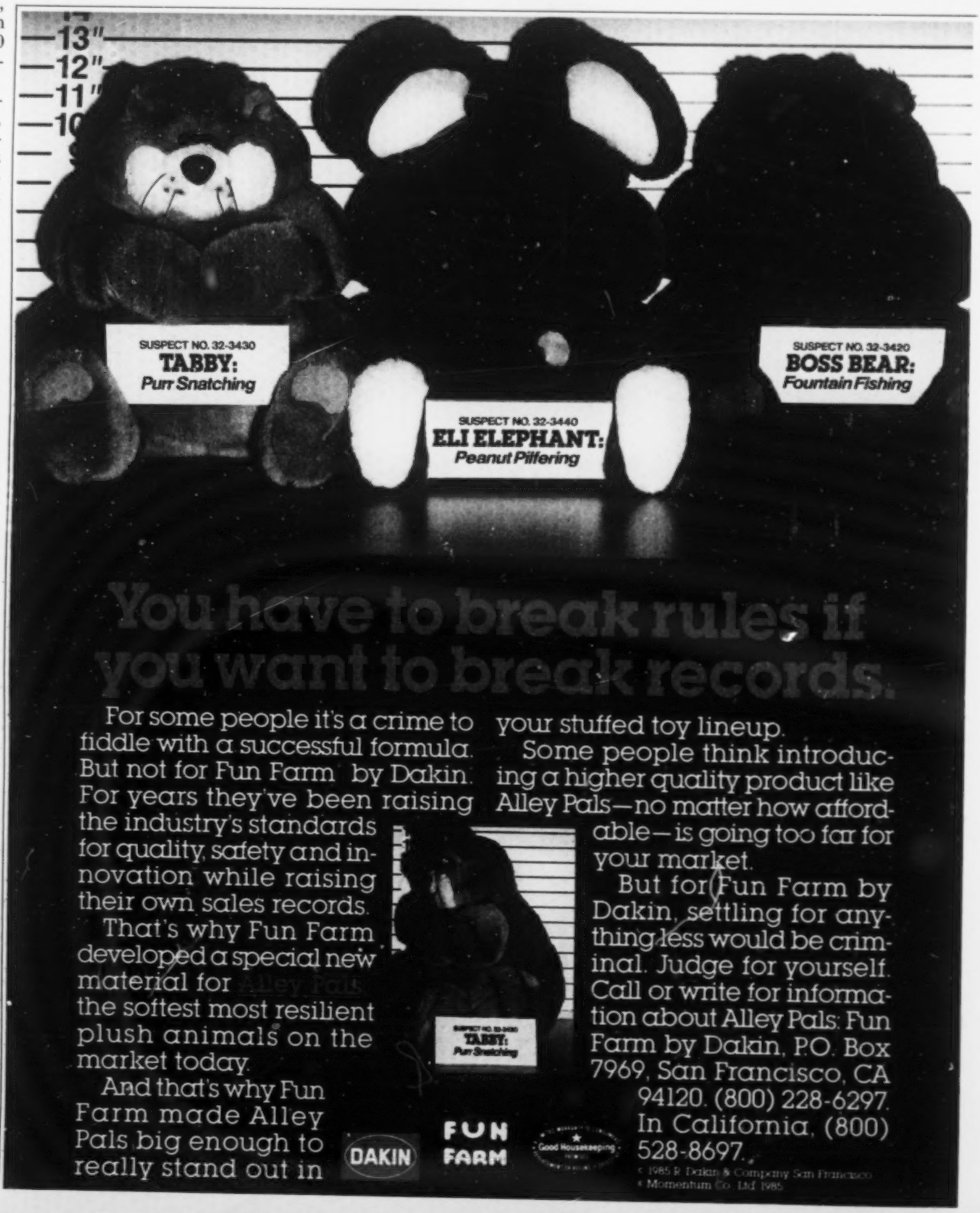
Source: DSN/Leo J. Shapiro & Associates

Growth Regions



In photo/camera, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the West—6%.

Source: DSN/Leo J. Shapiro & Associates



For some people it's a crime to fiddle with a successful formula. But not for Fun Farm by Dakin. For years they've been raising the industry's standards for quality, safety and innovation while raising their own sales records.

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Some people think introducing a higher quality product like Alley Pals—no matter how affordable—is going too far for your market.

But for Fun Farm by Dakin, settling for anything less would be criminal. Judge for yourself. Call or write for information about Alley Pals: Fun Farm by Dakin, P.O. Box 7969, San Francisco, CA 94120. (800) 228-6297. In California, (800) 528-8697.

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Photo/Camera

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Kodak	82%	89%	94%	84%
Polaroid	44	54	52	35
Canon	29	35	42	34
Minolta	29	21	36	31
Fuji	6	14	10	15
Nikon	10	5	13	6
Pentax	7	2	11	2
Continental	2	4	3	6
Olympus	6	2	3	6
Duracell	—	3	3	6

Source: DSN/Leo J. Shapiro & Associates

Japanese camera brands such as Canon, Minolta, Nikon and Pentax were consistently more popular among upscalers than among conventional managers polled. Shown is Nichols, Hagerstown, Md.

(DSN photo)

Photo

(Continued from page 97)

cited it. Fuji showed more strongly at conventional stores, 12%, than upscalers, 9%.

Continental, the eighth-leading brand at 4%, mustered its rating solely from conventional managers surveyed. Duracell, the only battery brand to make the top 10, was cited by 3% of managers polled.

Kodak's popularity appears even stronger when examining the brands favored at such leading chains as K mart, Wal-Mart, Zayre and Target. Kodak swept the No. 1 positions at all, with more than 9 managers in 10 naming it in each chain.

Polaroid made its best showing at Zayre, where 77% of managers said it was a leading brand—though that was still 20 percentage points fewer than Kodak.

Indeed, Polaroid was the second-leading brand at Wal-Mart, Zayre and Target, but tied Canon for third position at K mart.

K mart managers liked Minolta second-best behind Kodak. They named Minolta 7 times out of 10, and were largely responsible for Minolta's high placement on the top brands list.

Important Role

Fuji was favored most heavily at Wal-Mart, where nearly one manager in three named it as a top brand. K mart managers named Fuji one time in five, but the brand fared weakly at Zayre and Target.

The 35mm leadership battle between Canon and Minolta seemed to be a draw at these four chains. Canon was named more often at Wal-Mart, 35% to 13%, and Target, 28% to 23%. However, Minolta had a greater following at K mart, 69% to 44%, and Zayre, 21% to none.

Even on a regional basis, Kodak was the clear favorite. Its highest rating came from managers in the North Central part of the country, 94%; its lowest, 82% in the Northeast.

Polaroid was the second-leading brand in all regions. Canon and Minolta were nip-and-tuck in most parts of the country: tied in the Northeast, separated by three percentage points in the West, six in the North Central and 14 in the South.

Fuji was favored most in the Sunbelt areas of the South and West.

Significantly, discount chains across the nation aren't shuttering their doors to the entry of new brands. Managers across the U.S. reported carrying more national brands this year than last. More managers in the West than in any other region, 6%, reported such a gain.

YOU ALWAYS WIN WITH FUJI FILM.

WIN WITH QUALITY PICTURES Fuji film gives you color pictures that are so super sharp, so true to life, they're the next best thing to the real thing.

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WIN WITH BIG SAVINGS Get $2.00 off when you purchase any three rolls of Fuji film—disc, 110 or 35mm—15 exp. or more. A big value in any size.

WIN BY GETTING A TWO-SCISSOR SET FOR ONLY $2.95 Here's a deal as sharp as our pictures—buy two rolls of Fuji film at a participating dealer, and get a two-scissor set (a $12.95 comparative value), for only $2.95!

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COUPON VALID ONLY FOR FUJI FILM BOXES MARKED "MANUFACTURED FOR THE U.S.A."

Sporting Goods

(Continued from page 95)

tional managers, 15%; Remington rated much higher at conventional stores, 15%, than upscalers, 6%.

Diversified was the only exercise equipment brand to be among the most favored in sporting goods. Its 10% total frequency of mention by discount store managers made it No. 8. But that reflects far stronger support among upscalers, 21%, than conventional managers, 5%. Indeed, Diversified was the fourth-leading brand among upscalers, and was 10th at conventional stores.

MacGregor, No. 9 overall, was named by a scant 3% of upscalers as a top brand, but by 12% of managers at conventional chains, which sell its team sports gear and apparel.

Striking contrasts surfaced when manager responses at several leading chains were broken out. For example, half as many K mart managers—22%—cited Coleman as a top brand, compared with respondents from Zayre.

Interestingly, Coleman wasn't considered to be the leading sporting goods brand at either K mart, Wal-Mart, Zayre or Target—despite its healthy overall No. 1 rating in the survey. Coleman was ranked third at K mart and Zayre, and second at Wal-Mart and Target.

More Winners

Wilson, on the other hand, was a strong first among managers at Zayre and Target, and tied for first at K mart. Wilson registered a dominant 77% level of mention at Zayre and 47% at Target.

Its closest competition at Zayre was Spalding, which scored 63%, and was trailed by Coleman at 45%. Spalding also tied Wilson for the lead at K mart, at 23%, but was a weaker fourth at Wal-Mart, whose managers cited the brand just 14% of the time.

Wal-Mart managers were apparently responsible, however, for the appearance of Zebco and Igloo on the top brands list. Zebco, for instance, was named by 56% of Wal-Mart managers, but only 11% at K mart, 6% at Target and 3% at Zayre.

Somewhat less dramatically, 23% of Wal-Mart managers named Igloo as top sporting goods brand, compared with 18% at Target, 11% at K mart and 3% at Zayre.

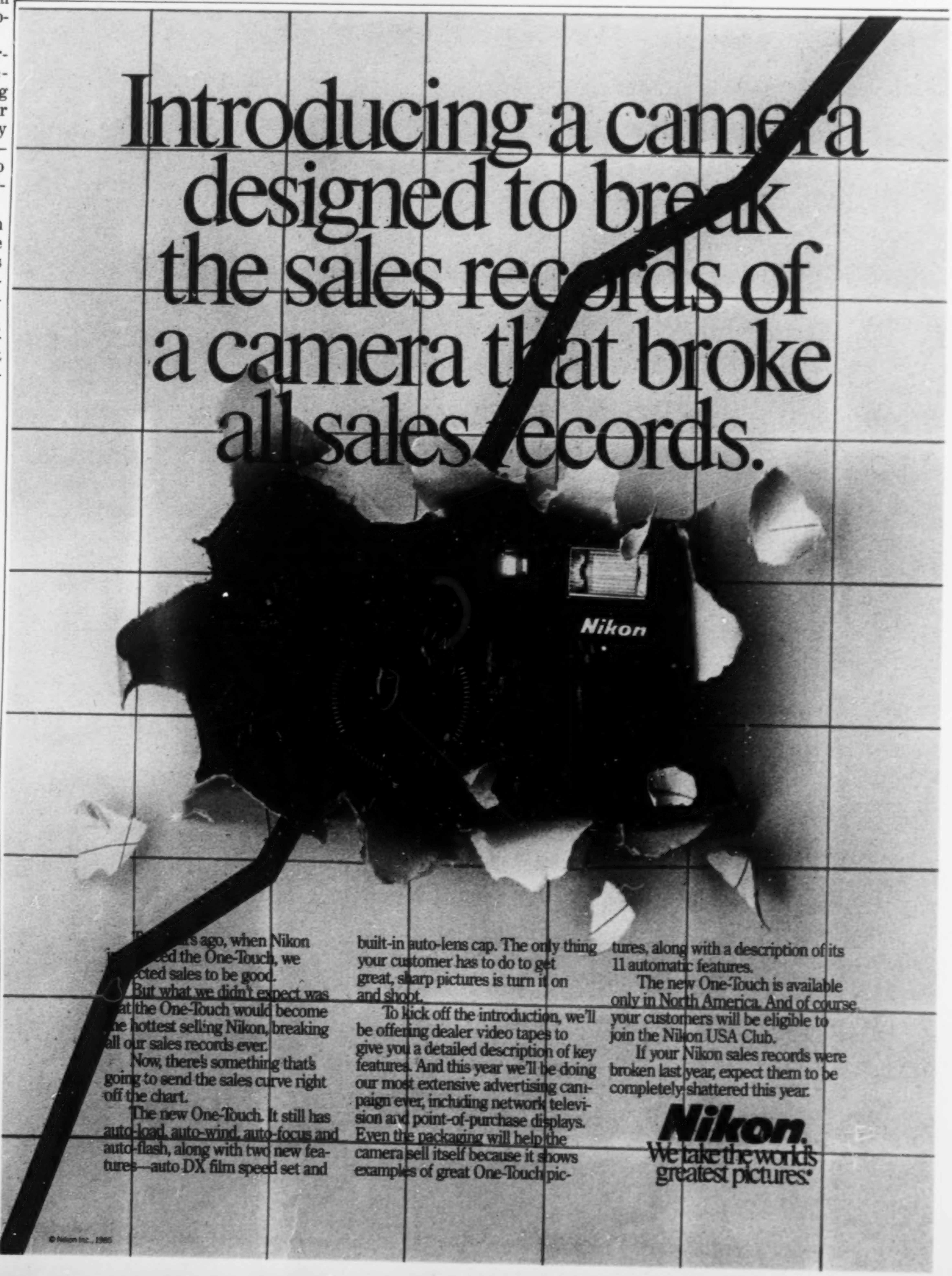
When examining brand popularity on a regional basis, it's not surprising to find outdoors brands scoring best in the South and West, where climates are most favorable. It was strength in those parts of the country that gave Coleman a lift into top brand honors.

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Coleman	37%	39%	42%	56%
Wilson	39	29	49	13
Spalding	32	23	30	19
Zebco	3	30	16	11
Igloo	6	19	14	19
Daiwa	3	18	14	13
Remington	2	14	9	20
Diversified	5	13	12	6
MacGregor	8	8	13	7
Garcia	7	7	6	11

Source: DSN/Leo J. Shapiro & Associates

Brands of fishing, camping and hunting equipment made up most of managers' favorites in sporting goods. Ames, Meriden, Conn., maximizes visibility of fishing tackle and inflatable rafts. *(DSN photo)*



Introducing a camera designed to break the sales records of a camera that broke all sales records.

T[illegible]rs ago, when Nikon i[illegible]ced the One-Touch, we [illegible]cted sales to be good.

But what we didn't expect was [illegible]at the One-Touch would become [illegible]e hottest selling Nikon, breaking all our sales records ever.

Now, there's something that's going to send the sales curve right off the chart.

The new One-Touch. It still has auto-load, auto-wind, auto-focus and auto-flash, along with two new features—auto DX film speed set and built-in auto-lens cap. The only thing your customer has to do to get great, sharp pictures is turn it on and shoot.

To kick off the introduction, we'll be offering dealer video tapes to give you a detailed description of key features. And this year we'll be doing our most extensive advertising campaign ever, including network television and point-of-purchase displays. Even the packaging will help the camera sell itself because it shows examples of great One-Touch pictures, along with a description of its 11 automatic features.

The new One-Touch is available only in North America. And of course your customers will be eligible to join the Nikon USA Club.

If your Nikon sales records were broken last year, expect them to be completely shattered this year.

Nikon.
We take the world's greatest pictures.®

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3 Jeans Brands Dominate the Category

Nationwide DSN Report

Three jeans brands dominated the top brands list in the men's apparel category—Wrangler, Lee and Levi's.

Although in overall performance, Wrangler was named the leading top brand, with mentions by 40% of discount store managers, conventional and upscale chains did not rank the top three brands the same way.

In the most dramatic difference in opinion, at upscale chains Levi's captured mentions by 52% of managers polled, while only 24% of managers at conventional chains named Levi's a top brand.

At conventional discounters, Wrangler was most often cited as a leading brand, with mentions by 42% of those polled. Yet, at upscale chains, Lee was ranked the second-strongest brand with an even stronger show of support—49%.

No. 4 on the top brands list was Fruit of the Loom, a basic underwear label which was named by a slightly smaller percentage than Levi's.

Brand strength fell off sharply after the top four, with McGregor, the men's sportswear brand, filling out the top five with mentions by only 16% of store managers.

However, the brand was considerably stronger at upscale chains where it won mentions by 27%, compared to 12% at conventional discount stores.

In overall performance, Dickies came in just slightly below McGregor, with mentions by 14% of managers, but in upscale chains it was far less popular than McGregor with citations by just 9%.

Jordache, in the No. 7 spot and Rustler in the No. 9 spot were the last two jeans brands on the list. Both brands fared better at upscale chains than in conventional discount stores.

Hanes, the second underwear brand mentioned, received the same percentage of mentions as Jordache—8%—but was stronger in upscale chains, with citations by 13% of store managers.

Arrow, No. 10 on the list, was named by fewer than 1% of managers at upscale chains, although it received citation by 6% of managers at conventional chains.

In the regional breakout no single brand dominated any one area. Wrangler won mentions by half of store managers polled in the South, but the brand also had a strong showing in the North Central States, 39%, the Northeast, 35% and the West, 30%.

The same holds true for Lee, which was mentioned by 44% of managers in the Northeast, but was a definite force in other parts of the country, too.

Managers in all four regions of the country surveyed also reported an increase in the number of brands carried this year vs. last year. In the Northeast and the South, 20% of store managers polled believed they were carrying more name brands this year. In the North Central States 13% of managers polled felt this way, and in the West, 9% agreed.

A look at how the top five brands fared in specific chains shows a wide divergence in brand strength.

Wrangler, named the leading brand on the top 10 list, received the highest percentage of mentions only at Wal-Mart (66%) and at K mart (43%). At Zayre, the brand received citations by only 10% of store managers

While Wrangler got slightly higher recognition at Target, with mentions by 44% of managers, than at K mart, Target managers chose Levi's as their top brand with citations by 70% of those polled. In fact, Lee, with mentions by 47% of Target managers, also came out ahead of Wrangler at that chain.

In general, brand strength in the top five list was consistently high at Target, while some of the top five brands were particularly weak in the other chains.

Men's Apparel

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Wrangler	40%	42%	37%
Lee	37	33	49
Levi's	31	24	52
Fruit of the Loom	29	26	32
McGregor	16	12	27
Dickies	14	15	9
Jordache	8	7	10
Hanes	8	5	13
Rustler	6	5	9
Arrow	4	6	—

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Wrangler	43%	66%	10%	44%
Lee	18	2	36	47
Levi's	33	11	38	70
Fruit of the Loom	26	41	21	31
McGregor	7	5	32	38

Source: DSN/Leo J. Shapiro & Associates

Top Brands' Performance by Region

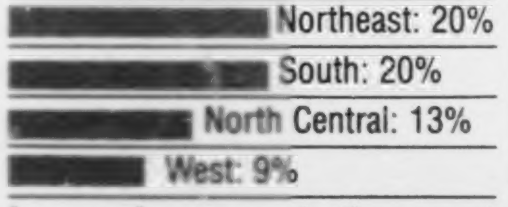
Brands	Northeast	South	North Central	West
Wrangler	35%	50%	39%	30%
Lee	44	38	39	27
Levi's	19	28	35	37
Fruit of the Loom	19	30	38	21
McGregor	19	10	21	18
Dickies	6	20	16	7
Jordache	7	8	8	9
Hanes	3	7	15	—
Rustler	5	3	10	6
Arrow	4	6	4	3

Source: DSN/Leo J. Shapiro & Associates

Overall, 16% of discount store managers said the number of men's wear brands being carried has increased this year. At K mart, 11% of managers cited an increase in the number of brands in the area

In men's apparel, three jeans brands—Wrangler, Lee and Levi's—dominate the top brands list. At Gemco, Rowland Heights, Calif., Levi's jeans are stocked along a fingerwall. (DSN photo)

Growth Regions



In men's apparel, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the Northeast and South States—20%.

Source: DSN/Leo J. Shapiro & Associates

Brand Strength Shifts by Region, Chain

Nationwide DSN Report

Few ladies' apparel brands enjoy consistent popularity across the board, with wide shifts in brand strength reported by region and by chain.

Lee, the No. 1 top brand, for example, was mentioned by 42% of all discount store managers polled. However, it won double the percentage of citations at upscale chains—64%—than at conventional discount stores.

On a by-chain basis, at Target Lee was noted by more than two-thirds, or 71%, of managers, but by only a scant 3% of managers at Wal-Mart.

This type of divergence in brand strength is most evident in the top four brands. Wrangler, No. 2 on the overall list, was favored by 41% of managers polled at upscale chains, yet its popularity with conventional chain managers sank 10 percentage points. Its recognition in conventional chains, though, is more in line with the brand's overall performance.

Both Levi's and Gitano, which took third and fourth place on the list, were also considerably more popular in upscale chains than at conventional discount stores. Levi's, which is not available to discounters directly, was mentioned by 40% of store managers at upscale chains compared to mentions by 14% at conventional stores, and Gitano was mentioned by 27% of upscale store managers as compared to just 11% at conventional chains.

In a twist, both Chic and Jordache were slightly more popular in conventional chains than at upscale discounters.

Playtex, the only nonjeans associated brand, and Gloria Vanderbilt, drew consistent responses from both upscalers and traditional chains.

Again, for Calvin Klein and Sasson, the differences were not so pronounced as among the top four leaders, with Calvin Klein slightly more popular among conventional discounters, and Sasson taking a small lead among upscalers.

Differences in brand strength among the top three brands are especially pronounced in the regional breakout.

Lee, which was mentioned by 57% of those polled in the North Central states—was the only brand to get higher than a 50% rate of mention in a single region. In fact, in the West, Lee received mentions by only 24% of those polled.

Levi's was strongest in the West, where it was mentioned by 41% of managers polled. In the Northeast, its popularity dropped dramatically to 3%.

Some brands that scored well nationally did not receive mentions by even 1% of those polled in the West. Chic, for example, which was named by 20% of managers in the North Central region, did not appear as a top brand in the West. The last three on the top brands list—Gloria Vanderbilt, Calvin Klein and Sasson—brands carrying major designer names, suffered the same fate.

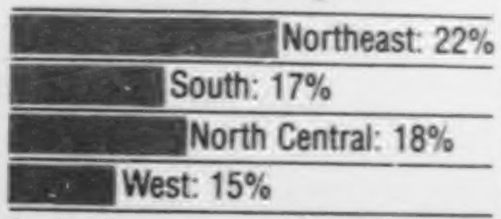
Although variations in Lee's popularity by-chain were perhaps the most dramatic of any brand store managers in each chain were also split in opinion about the other top four brands.

Wrangler, favored by 70% of managers at Target, received mention from only 14% of managers polled at Zayre. Another strong Target brand, Levi's, also received mention by 70% of its managers, but from only 3% of managers both at Wal-Mart and Zayre.

Gitano, which did not have a strong by-chain showing in general, did significantly better at Zayre, where it was mentioned by 24% of managers than at Wal-Mart, where it was named by only 4%.

Chic, although No. 5 on the overall performance list, received its strongest support from K mart with only a 9% rate of mention.

Growth Regions



in ladies' apparel, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the Northeast—22%.

Source: DSN/*Leo J. Shapiro & Associates*

Ladies' Apparel

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Lee	24%	3%	15%	71%
Wrangler	39	32	14	70
Levi's	28	3	3	70
Gitano	19	4	24	21
Chic	9	6	—	2

Source: DSN/*Leo J. Shapiro & Associates*

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Lee	42%	32%	64%
Wrangler	34	31	41
Levi's	21	14	40
Gitano	16	11	27
Chic	11	12	10
Jordache	7	9	6
Playtex	6	6	6
Gloria Vanderbilt	6	6	6
Calvin Klein	5	5	4
Sasson	5	4	7

Source: DSN/*Leo J. Shapiro & Associates*

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Lee	40%	39%	57%	24%
Wrangler	20	34	38	43
Levi's	3	11	29	41
Gitano's	20	13	13	22
Chic	9	11	20	—
Jordache	6	5	8	11
Playtex	12	6	4	6
Gloria Vanderbilt	3	6	11	—
Calvin Klein	11	3	5	—
Sasson	5	4	9	—

Source: DSN/*Leo J. Shapiro & Associates*

As Advertised
GITANO

Store managers report an increase in women's wear brands in their departments this year with 22% of managers in the Northeast giving that view. Shown is ladies' wear at Ames, Richmond. *(DSN photo)*

Our Promise to You...
LOW PRICES EVERYDAY

Nine of the 10 top brands in ladies' wear had their roots in the jeans business. Gitano, one brand featured at Nichols, Hagerstown, Md., was named a top brand by 16% of all store managers polled.

Company as Well as Brand Names Score

Nationwide DSN Report

In health & beauty aids, where manufacturers have spent considerable ad dollars promoting both their own and their product line names, the top brands' ranking reflects both presences in the marketplace.

A look at the top 10 list reveals that manufacturers captures six top-of-mind positions among discount store managers polled in the third annual *DSN* top brands survey. These are Johnson & Johnson, Revlon, Procter & Gamble, Clairol, Colgate and Maybelline.

In the case of the leader, Johnson & Johnson is both a brand name—affixed to labels for baby shampoo, oil, powder and Band-Aids—and a company name. For example, the company also owns Affinity, a brand of shampoo.

J&J was named a top-selling H&BA department brand by 33% of all store managers polled, and by 37% of managers at upscale chains.

Additionally, one product line made by a ranking manufacturer was also among the most often named H&BA department brands. Procter & Gamble's Crest won fifth place on the list.

P&G, cited by 25% of managers polled, grabbed third place, pulling only slightly ahead of Crest, mentioned by 23% of managers. At upscale chains, however, Crest had a stronger hold, being cited by 34% of the store managers.

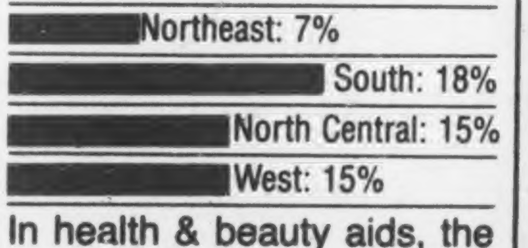
No. 2 Revlon, viewed as a top brand by a quarter of managers polled, was also more popular among upscale chains—where one third of managers said it was a top-selling brand—than among conventional discounters where its popularity was 10 percentage points less.

Also among the top five brands is Clairol. Best known for its hair care formulations, Clairol received notice by 24% of managers.

A second toothpaste brand, Colgate, ranked sixth on the list, was named by 16% of managers. Although the name is most associated with Colgate brand toothpaste, parent company Colgate-Palmolive is also the

(Continued on page 112B)

Growth Regions



In health & beauty aids, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the South—18%.

Source: DSN/*Leo J. Shapiro & Associates*

Health & Beauty Aids

Top Brands Vary by Type of Outlet

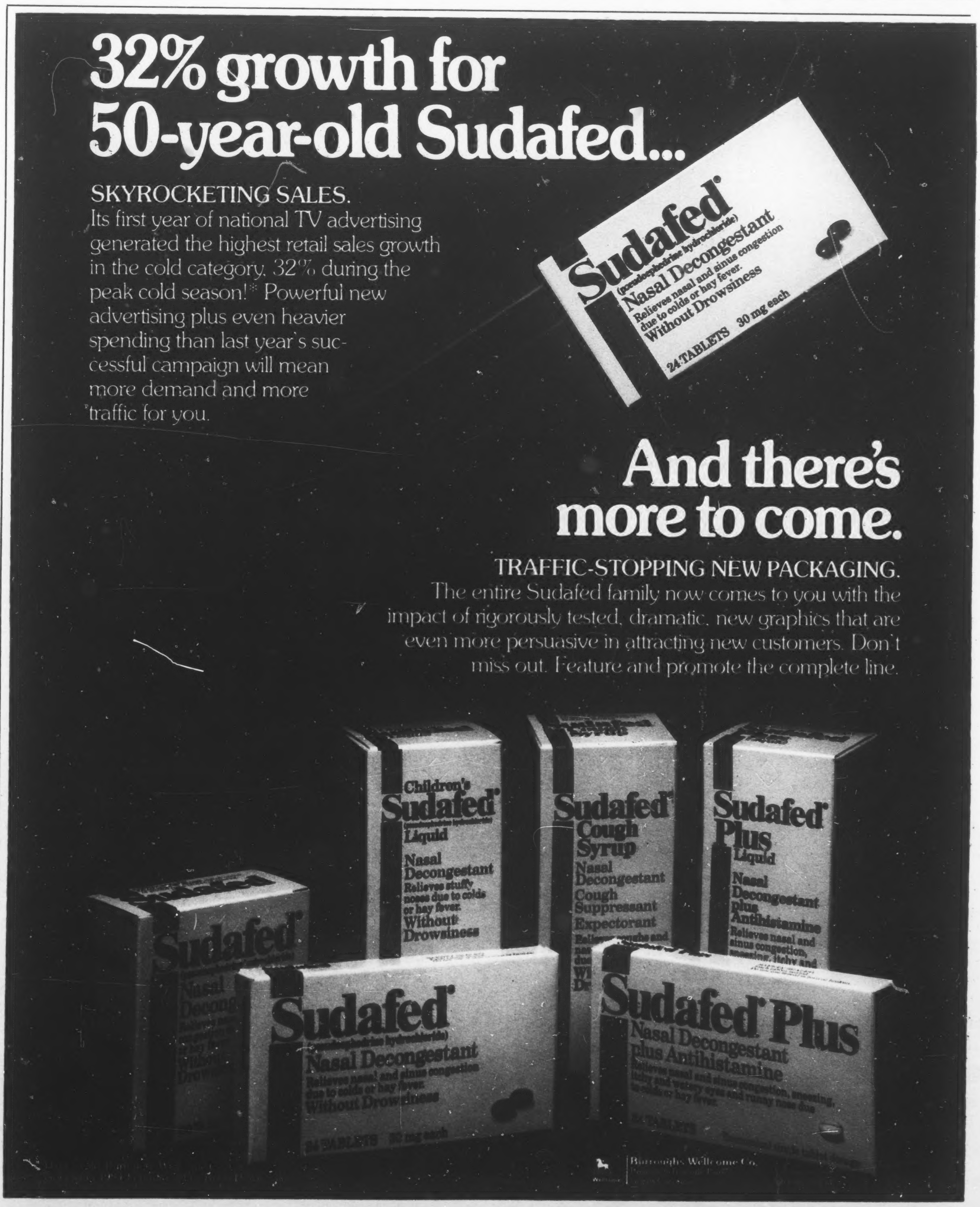
Brands	All Discounters	Conventional Discounters	Upscale Discounters
Johnson & Johnson	33%	33%	37%
Revlon	25	23	33
Procter & Gamble	25	25	24
Clairol	24	26	18
Crest	23	20	34
Colgate	16	15	17
Breck	10	6	18
Listerine	8	4	18
Bayer	6	8	3
Maybelline	6	8	1

Source: DSN/*Leo J. Shapiro & Associates*

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Johnson & Johnson	28%	34%	51%	27%
Revlon	16	25	14	29
Procter & Gamble	41	22	18	28
Clairol	43	5	20	16
Crest	17	38	17	34

Source: DSN/*Leo J. Shapiro & Associates*


Sudafed
(pseudoephedrine hydrochloride)
Nasal Decongestant
Relieves nasal and sinus congestion due to colds or hay fever.
Without Drowsiness
24 TABLETS 30 mg each
Children's Sudafed Liquid
Nasal Decongestant
Relieves stuffy noses due to colds or hay fever.
Without Drowsiness
Sudafed Cough Syrup
Nasal Decongestant
Cough Suppressant
Expectorant
Sudafed Plus Liquid
Nasal Decongestant plus Antihistamine
Relieves nasal and sinus congestion,
Sudafed Plus
Nasal Decongestant plus Antihistamine

32% growth for 50-year-old Sudafed...

SKYROCKETING SALES.
Its first year of national TV advertising generated the highest retail sales growth in the cold category, 32% during the peak cold season!* Powerful new advertising plus even heavier spending than last year's successful campaign will mean more demand and more traffic for you.

And there's more to come.

TRAFFIC-STOPPING NEW PACKAGING.
The entire Sudafed family now comes to you with the impact of rigorously tested, dramatic, new graphics that are even more persuasive in attracting new customers. Don't miss out. Feature and promote the complete line.

Burroughs Wellcome Co.

H&BA

(Continued from page 112A)

maker of Palmolive Soap, Irish Spring deodorant soap, Ultra Brite toothpaste and Ajax cleaning products, among others.

Although Colgate closely follows rival Crest in the overall line-up, it received only half of the mentions of Crest at upscale chains.

Filling out the top 10 list are Breck, 10%, a shampoo and conditioner line; Listerine, 8%, a mouthwash; Bayer, 6%, a line of pain relievers; and Maybelline, 6%. However, Maybelline was mentioned by only 1% of managers polled at upscale chains.

Maybelline also won first place in the cosmetics top brands survey with a strong show of support by 77% of managers polled. Apparently, Maybelline's value as a traffic builder has also sealed a place for it on this H&BA list as well.

On a regional basis, Johnson & Johnson retained its first place position in its home territory, the Northeast, and in the North Central states.

In the West, Revlon nudged J&J out of the lead, finding support from 37% of the managers vs. 36% for J&J.

In the South, P&G with 31% of the mentions, was the most popular brand. J&J was runner-up with 28%, and Revlon took fifth place in the South with 20%.

Among the four major chains surveyed, no agreement emerged as to which of the top five brands on the list was strongest. In fact, the differences were highlighted by a 38-percentage-point swing between K mart and Wal-Mart in the popularity of No. 4-ranked Clairol: At K mart, Clairol was the leading brand, with its popularity extending to 43% of managers. At Wal-Mart, the brand caught the vote of only 5%.

At Zayre, J&J was named the leading brand by 51% of managers. In contrast, the other top four's popularity appeared to sag. Revlon, for instance, was named by 14% of Zayre managers, 37 percentage points less than J&J's total.

At Wal-Mart, the No. 5 brand Crest was named the most popular by 38% of managers. However, J&J followed not far behind with 34%.

At Target, the strongest brand was also Crest, where it was listed by 34%. Closely following in popularity was Revlon, 29% and P&G, 28%. J&J was mentioned by 16%.

At K mart, P&G which was ranked by 41%, held a close second to Clairol. J&J was named by 28% of K mart managers polled.

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Johnson & Johnson	40%	28%	33%	36%
Revlon	19	20	26	37
Procter & Gamble	18	31	22	25
Clairol	21	21	26	30
Crest	14	25	32	13
Colgate	14	17	20	9
Breck	11	7	3	23
Listerine	7	8	14	—
Bayer	7	7	5	6
Maybelline	7	10	3	6

Source: DSN/Leo J. Shapiro & Associates

Crest
Crest
Crest
Crest
Crest
Colgate

Both Crest and Colgate, prominent brands at discounters like Clover, Lancaster, Pa., made this year's top 10 brands list. Procter & Gamble, the manufacturer of Crest, was also named.

Both of these paints will bring customers

Consumers want a paint they can stick with. Not one they'll feel stuck with.

That's why now is the perfect time to sell Glidden.

Glidden is a name consumers know and trust. Research proves no other brand available to you has better, more widespread consumer recognition and preference than Glidden.

And quality is what Glidden is recognized for. Glidden has been proving and improving its quality for over 100 years. And our sales show it. Consumers are buying more Glidden paint than any other brand you can carry.

That means you can count on sure sales and profits from Glidden. Not just the promises of potentially high margins that some paint companies offer.

What's more, the Glidden name

PERSONAL CARE/TOP BRANDS

The Top 4 Get Wide Range of Support

Personal Care

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Conair	42%	44%	34%
Clairol	35	32	47
Norelco	34	30	45
General Electric	32	35	28
Remington	19	16	24
Vidal Sassoon	15	10	28
Windmere	10	11	6
Sunbeam	8	8	11
Gillette	7	5	10
Black & Decker	7	6	8

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Conair	72%	48%	62%	24%
Clairol	40	17	27	43
Norelco	21	39	32	63
General Electric	34	20	26	20
Remington	24	34	13	27

Source: DSN/Leo J. Shapiro & Associates

Nationwide DSN Report

The dominance of the top four brands in personal care is apparent from the strong support given them by both conventional and upscale discount store managers.

Each of the four—Conair, Clairol, Norelco and General Electric—was cited as a top brand by more than 32% of discount store managers polled.

The next leading brands, in the Nos. 5 to 10 slots, ranged from 7% to 19% levels of mention—and were marked by less consistent levels of support among conventional and upscale store managers.

Conair and Clairol, the brands ranked Nos. 1 and 2 by managers in the survey, have been among the most aggressive in unleashing new product styling and packaging and deep promotions. That sort of activity by many manufacturers has helped maintain the size of personal care assortments at discounters, who've long spoken about trimming sku's that duplicate function.

Conair was named by 42% of all discount store managers polled, and was by far the brand most cited by managers at conventional chains—44%, compared to General Electric's 35% level of mention. However, Conair ranked third in the minds of upscale store managers—behind Clairol's 47% and Norelco's 45% ratings.

Clairol, named by 35% of managers polled to be the No. 2 brand overall, was considered third best by conventional store managers while being the most favored brand among upscalers.

Norelco and General Electric, the Nos. 3 and 4 brands overall, trailed Clairol by a whisker, with the three separated by a mere three points in total levels of mention—from 35% to 32%.

The next leading brand is Remington, at 19%, which generated fairly consistent support among conventional and upscale store managers. However, Vidal Sassoon, the No. 6 brand, scored nearly three times higher among upscalers—28%—than at conventional discounters—10%.

Following Windmere, Sunbeam and Gillette is department newcomer Black & Decker, which rounds out the top 10 listing of personal care brands. It's already achieved a 7% level of mention, despite the strong continuing presence of General Electric—the recently purchased label it will phase out by 1987.

Although total discounter support among the top five brands is strong, a more-

(Continued on page 147)

Glidden
pred

back. But for different reasons.

translates into greater related-product sales, such as brushes, rollers, wallpaper and the like. Which means your entire store will benefit by carrying Glidden paint.

That's not all. This year, Glidden is spending more on advertising than we ever have before. That's in addition to the fact that Glidden is already one of the best known brands you can get.

So start selling Glidden now. Contact Bob Koch, Director of Consumer Marketing, Glidden Coatings & Resins, 925 Euclid Ave., Cleveland, Ohio 44115. (216) 344-8220.

Glidden

Your paint should be this good.

SCM GLIDDEN COATINGS & RESINS
SCM CORPORATION, CLEVELAND, OHIO 44115

Brand Recognition Is Comparatively Low

Nationwide DSN Report

In children's apparel, brand recognition does not run as high as in other departments, according to the *DSN* top brands survey.

In fact, the No. 1 brand Garanimals, was named a best-selling brand by only 16% of all discount store managers polled. This puts it only slightly ahead of the No. 2 brand Lee, which was named by 14% of managers polled.

Garan, No. 3 (made by the same company as produces color-coordinated Garanimals), and Wrangler, No. 4, were both mentioned by 11% of store managers. Health-tex, filling out the top five brands, won mentions by 9%.

Interestingly, although not an apparel brand, Pampers made the top brand list in the No. 6 spot with mentions by 6% of store managers. Many discounters stock this highly recognized diaper brand in children's apparel departments to build traffic in that area of the store.

Completing the top brands list are Levi's, 6%, Curity, 5%, Gerber, 4% and Fruit of the Loom, 4%.

Brand strength in conventional chains is fairly consistent with the overall picture. However, one exception is Garanimals which, with mentions by 20% of those surveyed in conventional chains, was far more popular there than in upscale chains. The brand's popularity in upscale chains was only 9%.

There are even more instances, though, in which children's brands were stronger in upscale chains. Lee won mentions by 28% of store managers at upscale chains, a higher percentage of mentions than that of any other children's brand in either store classification. In contrast, the brand rated mention by only 9% in conventional discount stores.

Garan, Health-tex, Levi's and Curity also came out strong in contrast to their recognition in conventional chains.

In the regional breakout, Garanimals came out ahead of the other brands in 3 out of 4 areas, with its highest percentage of mentions, 21%, in the South. The brand won mentions by 17% of managers polled both in the Northeast regions and the West.

However, in the North Central region, Lee came out the top brand with mentions by 22%. In that area of the country, Garanimals was seventh in popularity, with mentions by only 10%.

No single brand won second place in more than one region of the country. In the Northeast, Lee was named the second most popular brand; In the South it was Wrangler; in the North Central region it was Health-tex and in the West it was Garan and Gerber.

However, managers in the North Central region gave a consistently higher percentage of mentions to brands than did managers in the other regions.

In the breakout of store managers' responses by chain, the results were not at all consistent.

Target managers, for example, named Health-tex, fifth on the overall list, their most popular brand with citations by 37% of those polled. The No. 1 overall top brand, Garanimals, was mentioned by only 2% of Target store managers.

At Wal-Mart, 32% of store managers named Garanimals a top brand, but the No. 2 overall top brand, Lee, did not get mentioned by even 1% of Wal-Mart managers. Neither did Health-tex.

At K mart, Garanimals was also named the most popular brand, but with mentions by a slim 7%. Support for the other top four brands was even weaker. Lee received mention by only 1% of managers at that chain, while Garan was not even mentioned by 1%.

At Zayre, both Lee, with 11%, and Garan, with 7%, came out ahead of Garanimals, 4%. However, store managers did not consider Wrangler and Health-tex a force in their chain's children's apparel department.

Children's Apparel

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Garanimals	16%	20%	9%
Lee	14	9	28
Garan	11	9	16
Wrangler	11	10	14
Health-tex	9	6	15
Pampers	6	5	9
Levi's	6	3	13
Curity	5	4	10
Gerber	4	4	5
Fruit of the Loom	4	3	6

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Garanimals	7%	32%	4%	2%
Lee	1	—	11	33
Garan	—	16	7	23
Wrangler	2	18	—	20
Health-tex	3	—	—	37

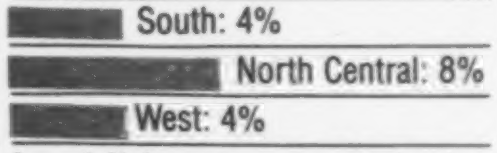
Source: DSN/Leo J. Shapiro & Associates

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Garanimals	17%	21%	10%	17%
Lee	13	12	22	7
Garan	8	12	12	10
Wrangler	8	14	14	3
Health-tex	5	7	15	6
Pampers	6	4	12	3
Levi's	1	5	12	2
Curity	3	3	9	6
Gerber	1	3	4	10
Fruit of the Loom	6	3	5	2

Source: DSN/Leo J. Shapiro & Associates

Growth Regions



In children's apparel, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the North Central States—8%.

Source: DSN/Leo J. Shapiro & Associates

Brand recognition in children's apparel departments is lower than in other discount store departments, according to store managers polled. Shown is Gemco, Rowland Heights, Calif.

Five per cent of store managers polled said they are carrying more children's wear brands this year. Pictured here is a revamped girls' wear department in Nichols, Hagerstown, Md. (DSN photo)

Black & Decker, Stanley Rule Rankings

Nationwide DSN Report

The hardware brands with the biggest following are Black & Decker and Stanley, according to discount managers nationwide, who named them as top brands more than four times as often as the next-leading brand.

The top two brands were cited so frequently that besides them only the No. 3 brand, Glidden, achieved a double-digit rating among managers. Glidden, in fact, was mentioned as a top brand by a significant 31% of managers at upscale discount chains—the closest any other hardware brand came to the top two.

Glidden's popularity among discount managers appeared to be twice as strong as that of Lucite, the next-leading paint brand and the No. 5 hardware brand overall, according to survey findings. Lucite's 8% rating, in turn, doubled that of Olympic, another paint brand that copped the seventh leading position in the department overall.

Significantly, the top six brands in the department represent a diversity of hardware categories—power tools and work tables, hand tools, paint, electrical and shelving.

Both Black & Decker and Stanley were supported consistently by discount department store managers polled. However, upscalers favored Black & Decker marginally more than did conventional managers, 70% to 68%. Those conventional discounters named Stanley more often than did upscalers, 63% to 58%.

Glidden was rated third on the strength of upscaler support, which was more than three times greater than its frequency of mention by managers at conventional chains.

The rest of the top brands in hardware were single-digit favorites. Except for Hirsch, the No. 6 brand overall which upscalers named 12% of the time, no other top brand was named by as many as 1 discounter in 10.

General Electric came closest. It earned its No. 4 rating and 8% frequency of mention by being a slight favorite at conventional stores, 9%, over upscalers, 6%.

Lucite achieved its 8% rating on a similar profile: 9% of conventional managers named the brand, compared with 5% at upscale chains.

Olympic and Du Pont tied for seventh place on the top brands list at 4%. Great Neck and Genie tied for ninth at 2%, rounding out the listing of favored hardware brands at discounters.

The dominance of Black & Decker and Stanley appears even greater when looking at the favored brands among four leading discount chains: K mart, Wal-Mart, Zayre and Target. No other brand threatens their lofty perch at any of these discounters.

Between the two, Black & Decker handily beat Stanley at K mart, Target and Zayre by margins as wide as 23 percentage points. However, Stanley hammered into the lead at Wal-Mart, 80% to 72%.

Among the rest of the top five hardware brands, only General Electric was cited by all four of these key discounters. It was mentioned most often by Zayre managers, 27% of the time, which was twice the rating it received at Wal-Mart.

Glidden and Lucite, the two paints among the top five brands in hardware, appeared to swap supporters at these four chains.

Nearly half of Target managers named Glidden, for instance, as did 14% at K mart. However, Wal-Mart and Zayre managers lined up in favor of Lucite.

Even on a regional basis, Black & Decker and Stanley show little softness. Black & Decker swept most of the nation by wide margins, although Stanley won the Northeast, 70% to 58%.

Black & Decker's winning margin in the South was just 68% to 64%, but that expanded in the North Central to a 77% to 62% score, and in the West to 70% to 44%.

Hardware

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Black & Decker	69%	68%	70%
Stanley	61	63	58
Glidden	15	9	31
General Electric	8	9	6
Lucite	8	9	5
Hirsh	5	2	12
Olympic	4	4	5
DuPont	4	5	2
Great Neck	2	3	1
Genie	2	1	6

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Black & Decker	86%	72%	88%	68%
Stanley	63	80	85	57
Glidden	14	—	—	45
General Electric	8	13	27	11
Lucite	—	16	6	—

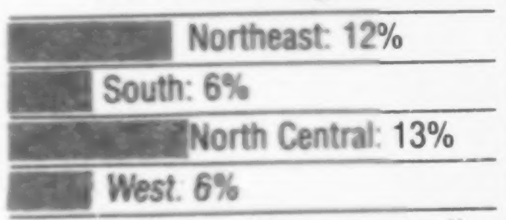
Source: DSN/Leo J. Shapiro & Associa

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Black & Decker	58%	68%	77%	70%
Stanley	70	64	62	44
Glidden	6	11	25	16
General Electric	6	14	7	4
Lucite	11	12	6	2
Hirsh	1	4	11	2
Olympic	—	4	6	6
Du Pont	4	2	4	6
Great Neck	—	1	2	6
Genie	—	2	5	—

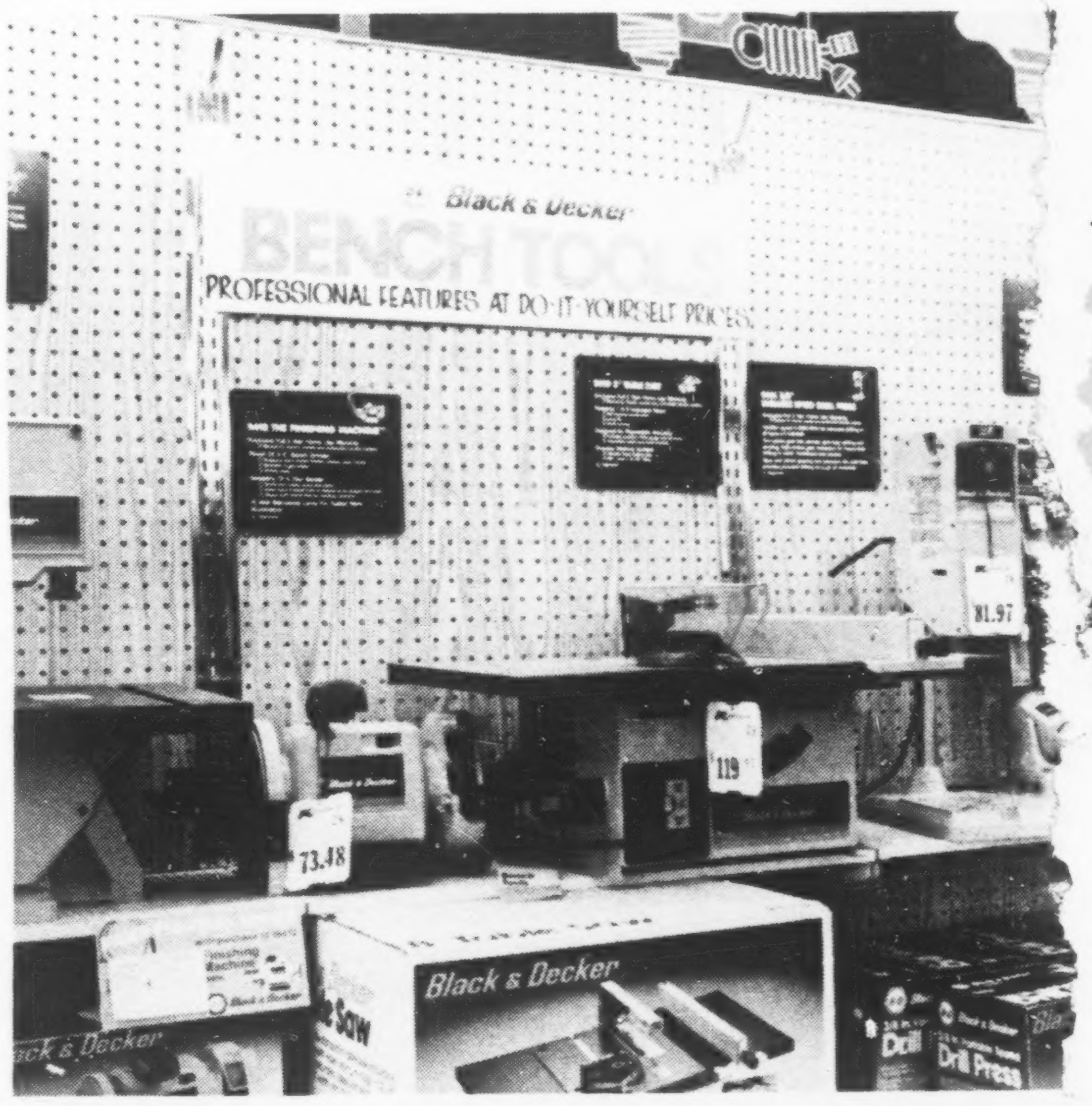
Source: DSN/Leo J. Shapiro & Associates

Growth Regions



In hardware, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the North Central States—13%.

Source: DSN/Leo J. Shapiro & Associates



A home center department at K mart, Rochester, Mich., uses pro inent brand signage to play off the popularity of Black & Decker, t No. 1 brand in hardware, according to managers polled. (DSN ph

HAND TOOLS
STANLEY
PEE

Stanley, the most favored hand tool brand among discounters polled, and Peerless plumbing supplies receive prominent display in hardware at Caldor, Eatontown, N.J. (DSN photo)

Cannon Leads; St. Mary's Is Distant 2nd

Nationwide DSN Report

Only one domestics brand—Cannon—won mention by a majority of discount store managers in the *DSN* top brands survey.

After that, three other brands—St. Mary's, J. P. Stevens and Pepperell/West Point—received comparatively low double-digit percentages of managers' responses.

Clearly, Cannon was the leading top brand with mentions by 56% of all store managers polled. That ranking was generated by a consistent level of responses from managers at both conventional and upscale chains. At conventional chains, the brand was named by 55%, and at upscale chains, by 57%.

The No. 2 brand, St. Mary's, lagged behind the first by 37% points, with mentions by 19% of all managers polled.

J. P. Stevens took the No. 3 position, with mentions by 17% of managers overall, but by only 10% of managers at upscale chains.

The No. 4 brand, Pepperell/West Point, was also mentioned by 17% of the managers. However, at upscale chains, its popularity was second only to Cannon's, with mentions by 27%.

Completing the top five brands list is Burlington, which was cited by 8% of those polled. However, the brand was more popular in conventional chains where it was mentioned by 10%, than at upscale chains, where it was mentioned by only 5%.

No. 6 on the list, Fieldcrest (4%), is a department store brand not available to discounters directly. However, earlier this year, the mill decided to affix the Fieldcrest label on goods shipped from its sister mass market line St. Mary's. The impact of that move on managers' perceptions of both the St. Mary's and the Fieldcrest brand has as yet not been determined.

The remaining brands on the list are Springs (4%), which began the policy of identifying its mass market label Tastemaker as a Stevens products several years ago; Santa Cruz (4%), Kenney's and Dan River (3%).

The 9th- and 10th-ranked brands, Kenney's and Dan River, did not receive citations by even 1% of managers polled at upscale chains.

Cannon's dominance of the top brands list is as evident in the regional and chain-by-chain breakouts.

In the regional breakout, Cannon came out particularly strong in the North Central region, with mentions by 63% of managers polled, and in the South, with mentions by 62%. The brand also received mentions by half of managers polled in the West, and by 40% of managers in the Northeast.

Only three other brands in the regional breakout won support from at least 20% of managers polled. One such brand was Pepperell/West Point, which took second place in popularity in the West, with mentions by 29%, and third place in the Northeast, with 20%.

St. Mary's took the second spot both in the Northeast, with 24%, and in the North Central region, with 23%.

In the South, J. P. Stevens was the second strongest brand, with mentions by 23%. It was the third strongest brand in the North Central region, with mentions by 23% of managers polled.

In comparison to its performance in the other regions, Santa Cruz showed strength in the West, where it was named the fourth most popular brand, with the support of 12% of those polled.

Based on responses by managers at four major discount store chains, Cannon was easily the most popular brand at Wal-Mart, K mart and Target, and still took first place at Zayre.

At Wal-Mart, Cannon was cited by 73% of those polled. Its second most popular brand, J. P. Stevens, received mention by only 22%, a drop of 51 percentage points.

At K mart, Cannon took the leading position with mentions by 67%.

Domestics

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Cannon	56%	55%	57%
St. Mary's	19	20	16
J. P. Stevens	17	19	10
Pepperell/Lady Pepperell/West Point	17	13	27
Burlington	8	10	5
Fieldcrest	4	5	3
Springs	4	5	1
Santa Cruz	4	5	2
Kenney's	4	5	—
Dan River	3	4	—

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Cannon	67%	73%	43%	67%
St. Mary's	22	10	41	12
J. P. Stevens	32	22	28	16
Pepperell/Lady Pepperell/ West Point	18	14	4	19
Burlington	20	—	3	—

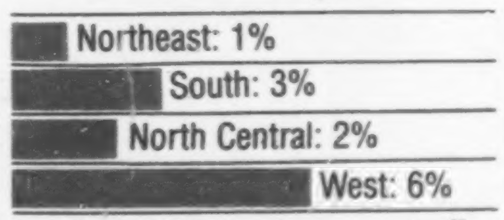
Source: DSN/Leo J. Shapiro & Associates

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Cannon	40%	62%	63%	50%
St. Mary's	24	14	23	16
J. P. Stevens	11	23	20	7
Pepperell/Lady Pepperell/West Point	20	10	14	29
Burlington	5	8	12	7
Fieldcrest	1	5	4	7
Springs	3	7	5	—
Santa Cruz	1	2	3	12
Kenney's	4	4	3	6
Dan River	5	5	1	2

Source: DSN/Leo J. Shapiro & Associates

Growth Regions



In domestics, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the West—6%.

Source: DSN/Leo J. Shapiro & Associates

SHOWER CURTAINS
BATH SHOP

Overall, store managers reported brand recognition is weak in domestics, except for No. 1 brand Cannon. At Richway, Sandy Springs, Ga., little manufacturer signage is evident in domestics .

In the West, 6% of managers polled said they are carrying more domestics brands this year. At Zodys, Torrance, Calif., matching sheets and comforters by Cannon get endcap position. *(DSN photo)*

Traditional Winners Maintain Popularity

Housewares

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Rubbermaid	39%	41%	31%
Corning	21	22	18
Anchor Hocking	17	17	21
General Electric	14	12	20
Ekco	14	12	20
Corelle	14	16	13
Mirro	11	14	3
Revere	9	8	11
Foley	8	6	15
Proctor-Silex	8	8	7

Source: DSN/*Leo J. Shapiro & Associates*

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Rubbermaid	23%	70%	70%	20%
Corning	18	42	14	20
Anchor Hocking	8	15	29	29
General Electric	8	3	10	26
Ekco	12	26	—	28

Source: DSN/*Leo J. Shapiro & Associates*

Nationwide DSN Report

The top traditional brands maintained their strong stance in housewares, despite a continuing influx of brands within the department, said store managers polled by *DSN*.

Managers' responses underscored two concurrent findings. For one, managers named vendors such as Rubbermaid and Corning as top brands, reflecting their long-term association and performance with discounters.

At the same time, managers gave the highest score to the housewares department when asked: In which departments has the number of national name brands increased over the past year?

Housewares was cited by 22% of store managers as a department where name brands penetrated further this year. Ladies' apparel was a distant second, at 18%, followed by men's apparel at 16% and health & beauty aids at 14%, with no other departments coming near these levels of growth in brands carried.

The trend to add brands continues to spread among discounters—particularly conventional discounters—who seek new suppliers to raise housewares margins, distinguish assortments and add more fashion-oriented merchandise to their expanding mixes.

Therefore, it's not surprising that managers at conventional discount department store chains—following the lead of upscalers—reported significant gains in housewares brand representation. At conventional chains, 23% of managers polled cited housewares as having the largest brand increases, compared with 18% at the upscalers.

On a regional basis, discounters in the West cited the greatest increase in brands carried, 39%. Discounters in the Northeast and North Central parts of the country followed at 19%; the South wasn't far behind at a significant 17% level of mention.

This addition of more brands in housewares hasn't pushed the traditional leaders off of their perches. Rubbermaid and Corning contin-

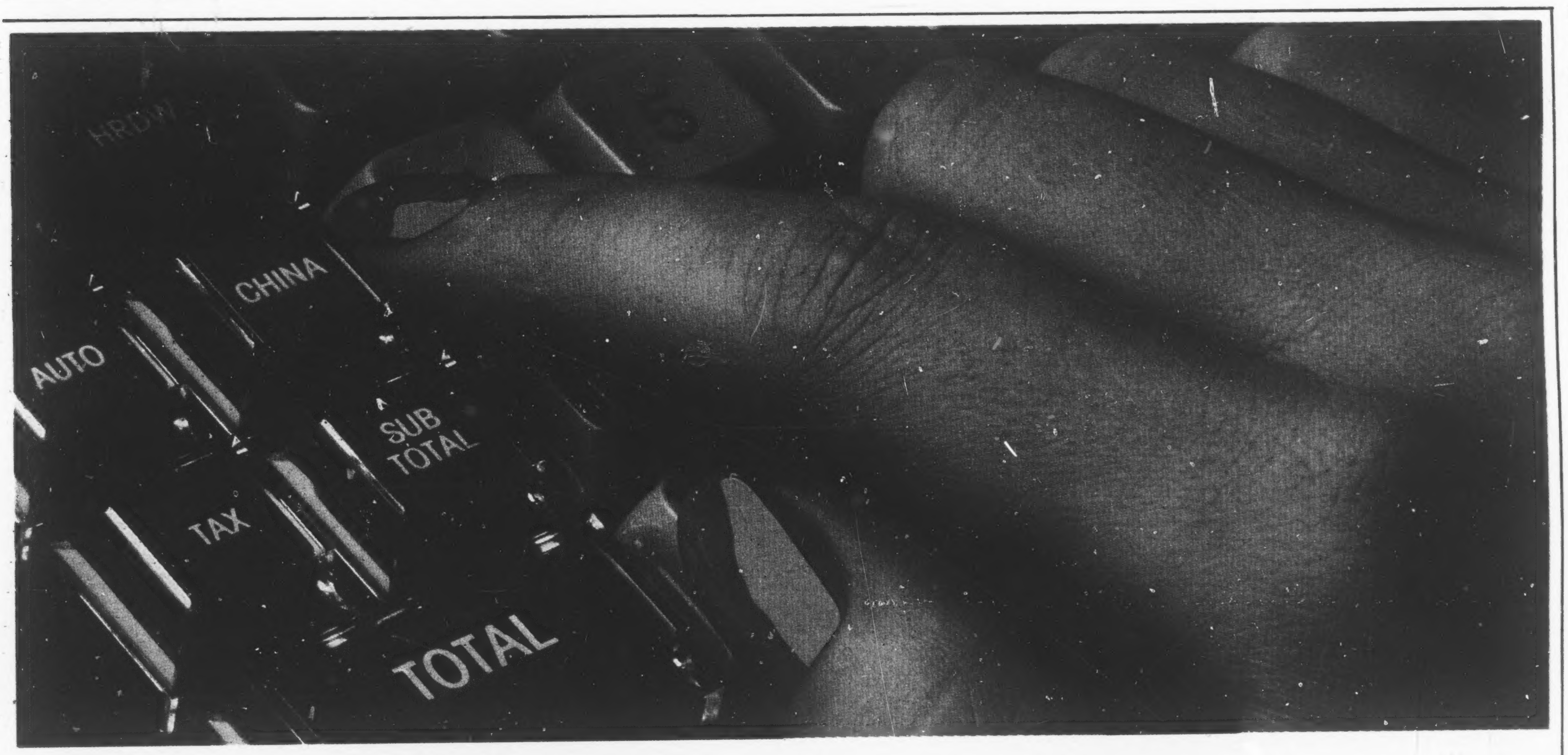
(Continued on page 132)

Growth Regions

Northeast: 19%
South: 17%
North Central: 19%
West: 39%

In housewares, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the West—39%.

Source: DSN/*Leo J. Shapiro & Associates*



VIGORO® ANNOUNCES A PROMOTION WHOSE IMPACT WILL BE REGISTERED ALL THE WAY TO CHINA.

There's never been a promotion like the Vigoro Greenback Offer. It's not only designed to move Vigoro like never before, but also merchandise in every department of your store. From toys to TV's, chairs to china.

Inside every Vigoro Deep Green™ product: Lawn Food, Weed & Feed, Crabgrass Preventer Plus Lawn Food, and Fall & Winter Fertilizer is a mail-in form. Your customers simply send it to Vigoro. They'll get back a Greenbuck certificate good for $2.00 off any item in your store.

So the more Deep Green your customers buy, the more Greenbucks they have to spend and the larger the purchases they'll want to make at your store. Just think what $8.00, $10.00 or more in Greenbucks per Deep Green customer could do for your sales.

You can't get that kind of storewide impact from any other rebate. Unlike other rebates the Greenback Offer guarantees that the money will be spent in your store only.

And to make sure customers come to your store in the first place, we have a powerful ad campaign. It includes TV, radio, magazine and newspaper ads.

The Vigoro Greenback Offer is the big promotion you deserve.

VIGORO DEEP GREEN LAWN FOOD
VIGORO DEEP GREEN WEED & FEED
VIGORO DEEP GREEN FALL & WINTER FERTILIZER
VIGORO DEEP GREEN CRABGRASS PREVENTER PLUS LAWN FOOD

You deserve a big promotion.

VIGORO®

Housewares

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Rubbermaid	43%	49%	31%	31%
Corning	20	23	22	19
Anchor Hocking	10	13	17	33
General Electric	15	11	20	12
Ekco	7	19	15	13
Corelle	11	17	16	7
Mirro	7	11	10	16
Revere	4	7	6	22
Foley	—	6	8	19
Procter-Silex	6	6	9	11

Source: DSN/Leo J. Shapiro & Associates

The appearance of more brands on discounters' housewares shelves hasn't hurt the popularity of several key cookware brands, displayed on slat-back gondola at Gemco, Rowland Heights, Calif. *(DSN photo)*

Housewares

(Continued from page 128)

ue to be the department's one-two punch.

Rubbermaid, the No. 1 brand according to findings, was cited by 39% of managers polled, including 41% at conventional chains and 31% at upscalers.

Corning copped the second spot among "all" discounters polled by being named 21% of the time. That represents a fairly balanced following: 22% at conventional chains and 18% at upscalers.

In addition, one of this vendor's specific lines—Corelle—tied for the fourth spot among leading brands on the strength of managers' 14% rating. It found a stronger following among conventional managers, 16%, than upscalers, 13%.

Anchor Hocking, the only glassware manufacturer in the top 10, nailed down the No. 3 position with a 17% level of mention among managers at conventional chains and 21% at upscalers.

Electric appliance, bakeware, gadgets and cookware manufacturers round out the top 10 brands listing in housewares.

Key Changes

General Electric, tied for the fourth spot with Ekco and Corelle, should be virtually phased out in housewares by the end of next year because of its acquisition by Black & Decker. Its current 14% rating as a top brand, however, reflects GE's ongoing popularity.

Ekco's profile in the survey was identical in some respects to GE: each was cited by 12% of managers at conventional discount chains and 20% at upscalers.

A trio of cookware brands—Mirro, Revere and Foley—took the Nos. 7, 8 and 9 spots with only marginal differences in their overall ratings. However, Mirro fared far better among conventional managers, and Revere and Foley at upscalers.

Proctor-Silex received even support from conventional and upscale store managers to achieve its 8% rating and No. 10 standing.

Notable contrasts emerge when looking at performance of housewares' top five brands on a chain by chain basis. For instance, Rubbermaid dominated Wal-Mart and Zayre manager ratings, at 70%, but fell into the 20% range at Target and 23% at K mart.

Similarly, though on a less grand scale, Corning was cited by 42% of Wal-Mart managers, but less than half that figure at other major chains: 20% of Target managers, 18% at K mart and 14% at Zayre.

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P&G Cleans Up as Tide Leads Windex

Household Chemicals

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Procter & Gamble	32%	37%	19%
Tide	29	20	53
Windex	13	10	22
Downy	9	9	11
Comet	9	9	7
Cheer	7	6	10
Vanish	5	4	8
Dawn	3	4	1
Ivory	2	1	4
Mr. Clean	1	1	1

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Procter & Gamble	36%	70%	26%	15%
Tide	9	32	6	75
Windex	17	2	10	21
Downy	12	15	4	17
Comet	8	8	6	10

Source: DSN/Leo J. Shapiro & Associates

Nationwide DSN Report

Procter & Gamble cleaned up in household chemicals.

Among the top 10 brands cited by discount managers polled, five are made by Procter & Gamble—Tide, Downy, Comet, Cheer and Ivory. On top of that, managers named the manufacturer most often, giving it the No. 1 spot, even though it isn't a brand at all.

Among actual brands cited, Tide was the runaway leader, at a 29% rate. Managers at upscale chains favored it most, 53%, compared to 1 in 5 at conventional discounters.

That led the next brand, Windex, by more than a 2-to-1 margin. Windex was named a top brand by 13% of discounters surveyed, including 22% at upscale chains and 10% at conventional discount department stores.

After Tide and Windex, single-digit ratings reign. Downy and Comet tied at 9%; Cheer followed at 7%. Vanish, Dawn, Ivory and Mr. Clean were each mentioned by fewer than 1 manager in 20.

Downy, Cheer, Vanish and Ivory each had more frequent mentions by upscalers than managers at conventional chains.

A close look at how household chemicals fared at top chains revealed sporadic support for many of the top brands. As an example, Windex was cited second-most often at Target, Zayre and K mart, but was considered a top brand by only 2% of Wal-Mart managers.

Similarly, Downy was third at all but Zayre, which named it a top brand only 4% of the time.

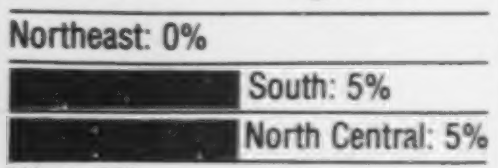
At the head of the list, Procter & Gamble had uneven support. Seven out of 10 Wal-Mart managers named the manufacturer, as did 36% at K mart, 26% at Zayre and 15% at Target.

Tide also was strong at just two of these leading chains: 75% at Target and 32% at Wal-Mart, compared with fewer than 10% of K mart and Zayre managers naming it.

Comet, in the fifth position overall, had the most consistent support from chain to chain. At Target, 10%

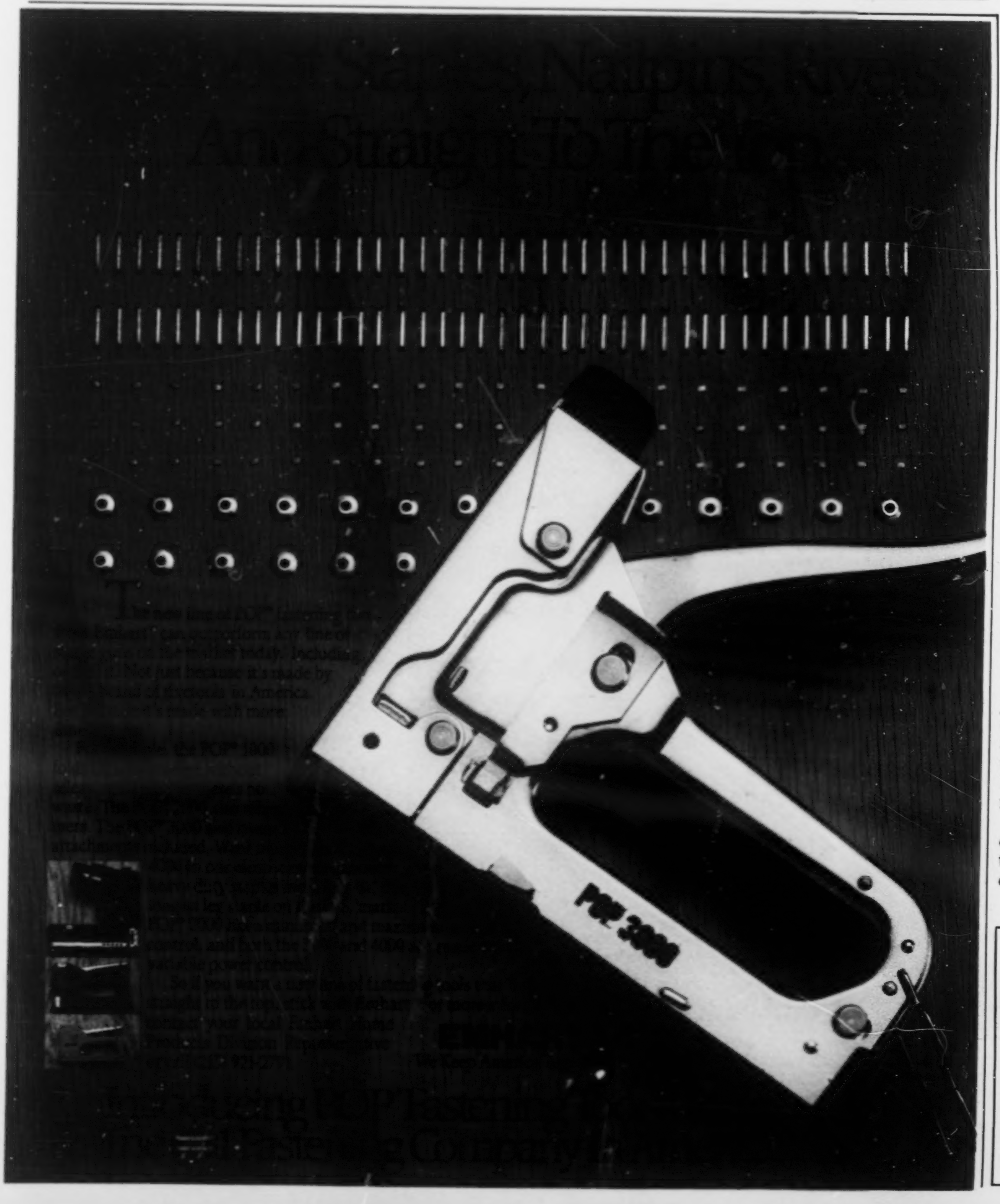
(Continued on page 147)

Growth Regions



In household chemicals, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the South and North Central States—5%.

Source: DSN/Leo J. Shapiro & Associates



Maybelline Tops; Upscalers Like Revlon

Nationwide DSN Report

Maybelline's broad-based support among discount store managers won it first place in *DSN*'s top brands cosmetics survey.

While Maybelline was named almost as often as a top brand at upscale chains as in conventional ones, store managers at the upscale chains cited Revlon even more often.

In all discount stores, Maybelline was cited as a top brand by 77% of store managers, and by a slightly higher percentage (78%) of managers at conventional discount stores. However, at upscale chains, Revlon came out the leading top brand, with mentions by 80% of store managers.

Revlon, the No. 2 top brand overall, was cited by fewer than half (46%) of store managers at conventional discount store chains.

Cover Girl was named the No. 3 brand in both conventional and upscale discount stores, although it ranked highest in upscale chains, with mentions by 48% of managers.

Max Factor, too, mentioned by 29% of all discount store managers polled, held to its ranking (fourth place) in both conventional and upscale chains.

Aziza, the brand which sparked considerable interest last year with its introduction of the first polishing pen for dispensing nail polish, was most popular among upscale discounters. The brand was mentioned by 20% of store managers. Aziza was tied with L'Oreal for the Nos. 5 and 6 positions.

In contrast with Aziza, Noxell was mentioned more frequently by managers in conventional chains than by those in upscale discount stores.

With interest in nail care products and treatments on the upswing, it is interesting that Cutex, the nail care brand, took a position in the top brand list.

In all areas of the country, discount store managers polled felt they were carrying more brands of cosmetics this year than they had the year before. This was most the case in the West, where 19% of store managers cited an increase in the number of

(Continued on page 139)

Cosmetics

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Maybelline	77%	78%	77%
Revlon	54	46	80
Cover Girl	45	43	48
Max Factor	29	28	35
L'Oreal	12	3	11
Aziza	12	9	20
Noxell	7	8	2
Coty	6	5	8
Cutex	5	5	4
L'Erin	4	5	2

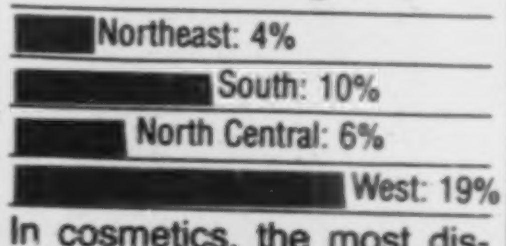
Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Maybelline	91%	92%	71%	80%
Revlon	45	36	61	86
Cover Girl	36	64	52	69
Max Factor	30	29	39	21
L'Oreal	19	5	—	6

Source: DSN/Leo J. Shapiro & Associates

Growth Regions



In cosmetics, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the West—19%.

Source: DSN/Leo J. Shapiro & Associates

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At Zayre, 71% of store managers polled named Maybelline their leading cosmetics brand, followed by Revlon, 61%, Cover Girl, 52%, and Max Factor, 39%. Shown is Zayre, Medford, Mass.

Cosmetics

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Maybelline	63%	82%	79%	80%
Revlon	46	47	64	61
Cover Girl	36	51	56	28
Max Factor	30	21	29	39
L'Oreal	9	13	10	17
Aziza	15	14	15	3
Noxell	5	8	6	7
Coty	2	3	10	7
Cutex	2	5	5	5
L'Erin	5	3	3	6

Source: DSN/Leo J. Shapiro & Associates

Cosmetics

(Continued from page 138)

cosmetics brands carried.

Store managers in all areas of the country also reported Maybelline to be the most popular brand, with mentions by 82% of managers in the South, 80% in the West, 79% in the North Central States and 63% in the Northeast.

Managers in the North Central states also gave strong support to Revlon, which received mentions by 64% of those polled, and to Cover Girl, which was cited by 56% of those polled.

In the West, managers also gave high recognition to Revlon, with mentions by 61% of those polled, but Cover Girl was only cited by 28%.

In general, brand strength by region fell off below the four leading brands, which includes Max Factor in addition to Maybelline, Revlon and Cover Girl.

In an unusual variation by region, Aziza was cited by 15% of store managers in the Northeast and the North Central States and by 14% of managers in the South, yet the brand was only mentioned by 3% of those polled in the West.

In the chain-by-chain breakout, Maybelline took the No. 1 position in all but Target, where Revlon was named the leading brand.

At Wal-Mart, Maybelline was named by 92% of store managers, and by almost as many managers (91%) at K mart. At Zayre, the brand received mentions by 71%.

However, while more managers (80%) cited Maybelline as a top brand at Target than at Zayre, Revlon scored even higher at Target; it came out on top with citations by 86% of store managers polled.

Another strong brand at Target was Cover Girl, which received mentions by 69%. The brand was also popular at Wal-Mart, where it was mentioned by 64% of managers, taking the No. 2 spot for that chain.

At Zayre, the No. 2 spot was taken by Revlon, with mentions by 61% of managers, followed by Cover Girl, with mentions by about half of store managers polled.

In comparison to the other chains, brand recognition was not as strong at K mart past the leader Maybelline. The chain's second most often cited brand, Revlon, was mentioned by only half the number of managers who pegged Maybelline their leading chain cosmetics brand.

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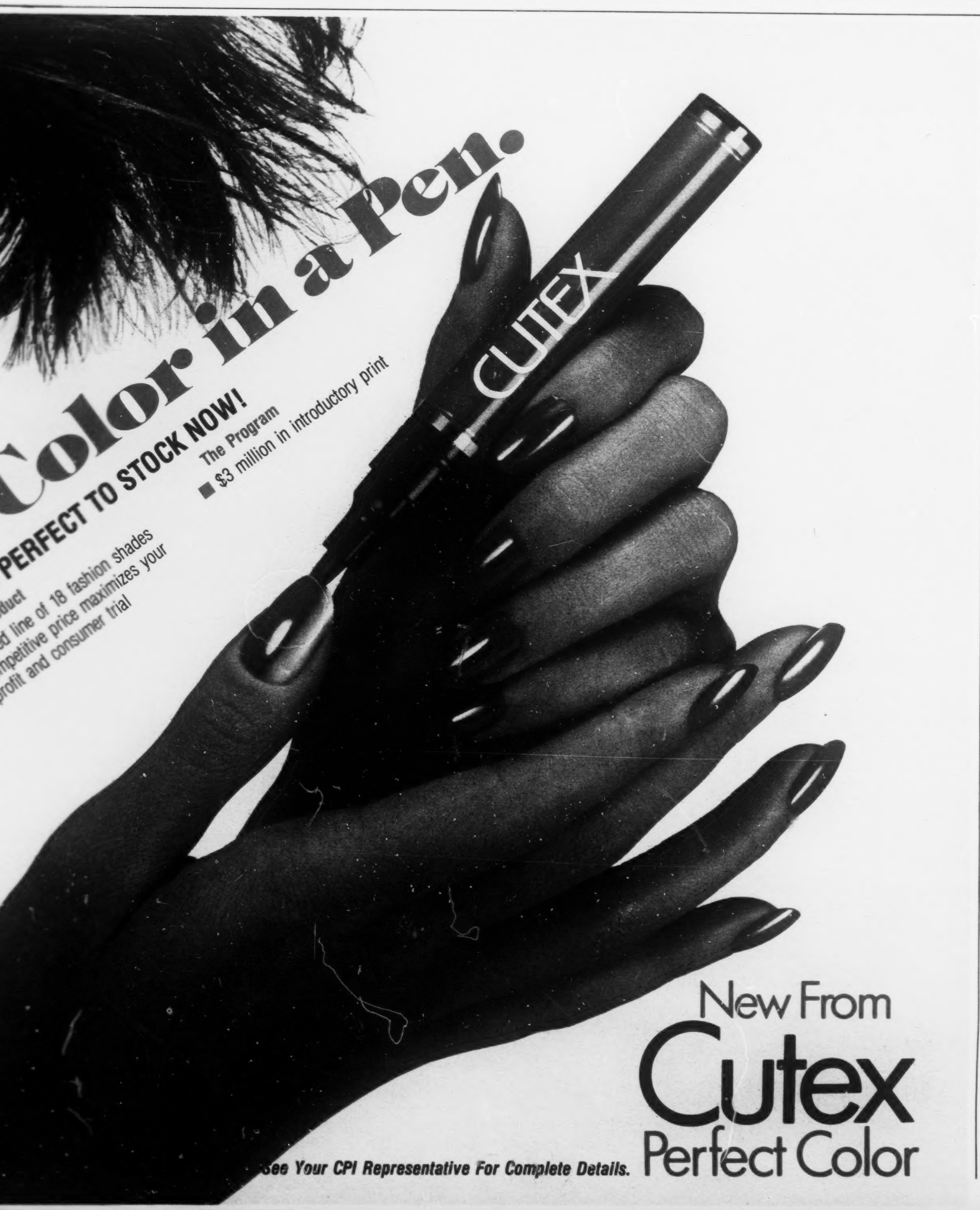
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Oils, Chemicals Comprise 6 of Top 10

Automotive

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Quaker State	49%	53%	42%
Pennzoil	35	34	39
Fram	20	16	29
STP	18	21	10
Valvoline	18	13	29
Prestone	16	17	12
Havoline	15	17	13
AC-Delco	12	7	23
Champion	11	10	11
Lee	7	4	14

Source: DSN/*Leo J. Shapiro & Associates*

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Quaker State	48%	55%	86%	24%
Pennzoil	35	38	6	44
Fram	15	41	41	51
STP	10	5	31	6
Valvoline	16	23	13	45

Source: DSN/*Leo J. Shapiro & Associates*

Nationwide DSN Report

Oils and chemicals copped six of the top 10 brand positions in automotive, reflecting their prominent sales draw.

However, replacement parts and battery makers rounded out the top brands listing, according to discount store manager responses, which suggests a continuing emphasis toward many different types of easy do-it-yourself car maintenance products.

Quaker State, mentioned by 49% of all managers polled and squarely in the driver's seat, led three other oils on the top brands list—Pennzoil, Valvoline and Havoline. The closest of these, Pennzoil, was cited by 35% of managers surveyed. Together, Quaker State and Pennzoil were the runaway department leaders when store managers were asked to name their top automotive brands.

Fram, named by 20% of discounters polled and the third-leading brand overall, captured replacement part honors. AC-Delco, Champion and Lee, which were cited by 7%-12% of managers polled, rounded out this classification's showing among top brands.

STP, the No. 4 brand overall at an 18% rating, and Prestone, the No. 6 brand at a 16% rating by discount managers, were the only engine chemicals to appear on the current top brands listing.

Significantly, the top 10 brands represent three diverse product segments: oils, chemicals and batteries and replacement parts.

Among the five leading brands, Quaker State and Pennzoil registered the most consistent support among managers at conventional and upscale discount chains. Quaker State was named a top brand by slightly more than half of conventional discounters, and 42% of upscalers. Pennzoil was favored by more upscalers, 39%, than conventional managers, 34%.

The disparity of support widened among the next three most popular automotive brands. Managers of upscale stores favored Fram and Valvoline roughly twice

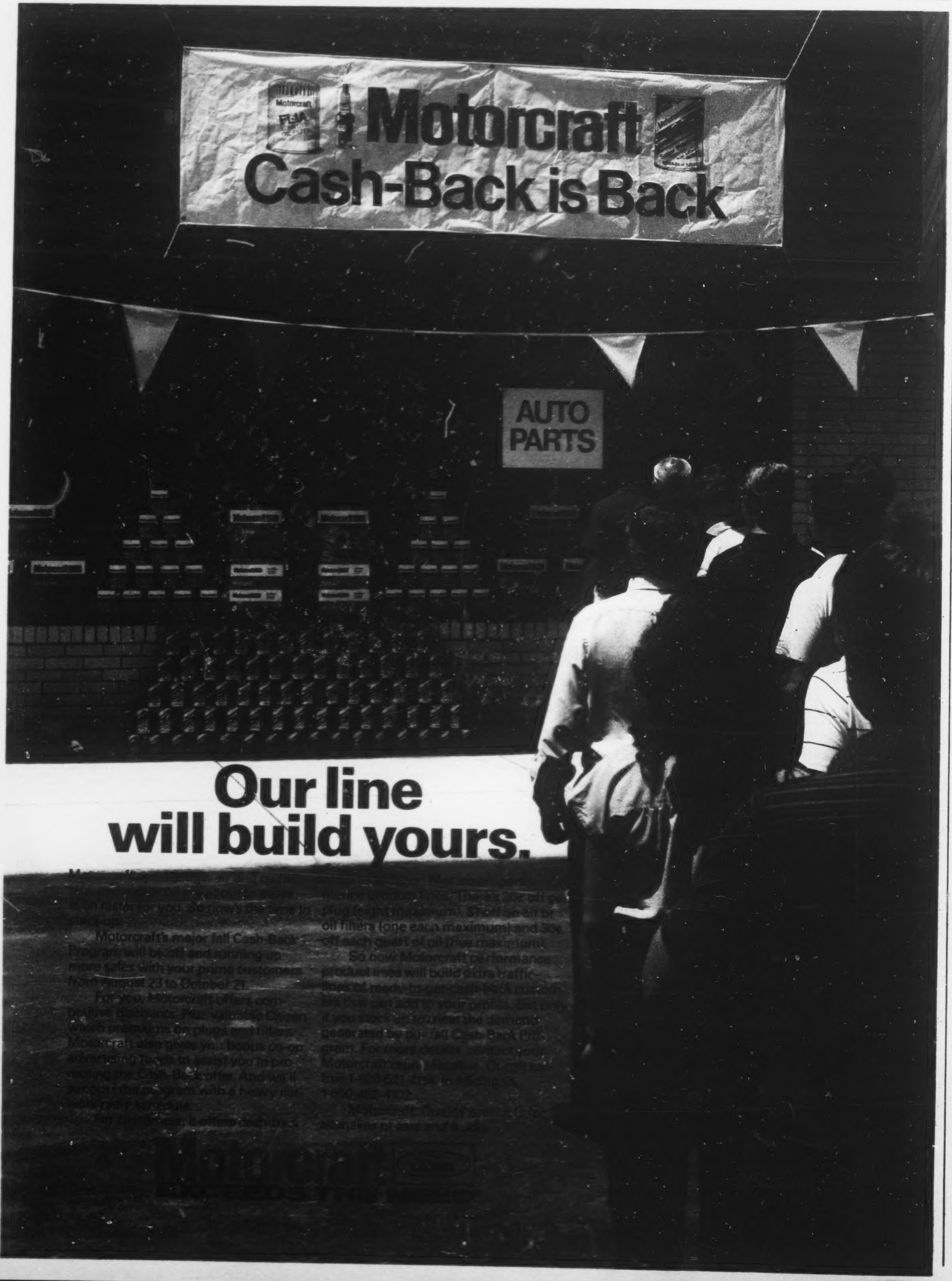
(Continued on page 145)

Growth Regions

▬ Northeast: 3%
▬ South: 5%
▬ North Central: 4%
West: 0%

In automotive, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the South—5%.

Source: DSN/*Leo J. Shapiro & Associates*



Quaker State, Pennzoil in Driver's Seat

(Continued from page 140)

as much as at conventional stores; the reverse was true for STP.

Except for AC-Delco, the only battery brand near the top, the rest of the top 10 received consistent support among managers at conventional and upscale chains. AC-Delco, the No. 8 brand overall, was considered the fifth leading brand by upscalers, who named it 23% of the time.

A sharp contrast surfaced in Quaker State's overall ratings when evaluated on a chain by chain basis. Only 24% of Target managers cited it as a top brand, compared with 86% at Zayre, 55% at Wal-Mart and 48% at K mart. Zayre managers, who were so high on Quaker State, named Fram next most often as a top automotive brand—but less than half the time, 41%. Next at Zayre was STP, at 31%, which was by far its strongest rating among leading discount chains surveyed.

Managers at Wal-Mart also named Fram their No. 2 brand, at 41%, followed by Pennzoil, 38%.

Responses by K mart managers most closely paralleled the overall top brand ratings. Following Quaker State in the No. 1 position was Pennzoil at 35%, Valvoline at 16%, Fram at 15% and STP at 10%.

STP, it appears, built its overall top brand rating on the strength of support at Zayre.

Quaker State may have reached the No. 1 spot overall, but it didn't sweep the country. The brand was first by a wide margin in the Northeast and South, where approximately six discount store managers in 10 named it a top brand. But in the North Central and Western parts of the country, the brand placed second, as only 4 out of 10 cited it as a leader.

Western discounters preferred Pennzoil, naming it 57% of the time. After Quaker State's runner-up stance, there's a sharp falloff to the third-leading automotive brand, in the opinion of Western-based managers. STP, named 19% of the time, edged Havoline, cited by 18% of discount store managers in the West.

In the North Central region, Quaker State and Pennzoil tied for the lead, followed distantly by AC-Delco and Fram, which were both cited by 21%.

Among managers in the Northeast and South, Pennzoil held the second top brand spot securely. Northeastern managers, for example, named it 20% of the time.

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Quaker State	61%	58%	37%	43%
Pennzoil	20	28	37	57
Fram	15	26	21	13
STP	15	21	17	19
Valvoline	8	17	30	10
Prestone	8	26	17	4
Havoline	4	23	12	18
AC-Delco	11	10	21	—
Champion	8	12	13	6
Lee	13	7	8	—

Source: DSN/*Leo J. Shapiro & Associates*

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Oils and chemicals, which took the majority of top brands listings in automotive, are easy-to-use, do-it-yourself maintenance items. They're endcapped by the race track at Nichols, Hagerstown, Md.

(DSN photo)

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Writing Instruments Win Half of Top 10

Nationwide DSN Report

The top stationery brands cited by discount store managers cover a broad range of product categories including filler paper, school and home office supplies, writing instruments and greeting cards.

Half of the brands mentioned in the top 10 list represented writing instruments.

Although Mead, a filler paper/notebook supplier, was the clear-cut leader in the number of mentions as a top brand, it was still named by fewer than half of all discount store managers polled. However, among upscale discounters, Mead received mentions by 53%.

The next three top brands on the list—Bic, Papermate and Parker—are all writing instrument brands. However, Bic was far and away the most popular one, with mentions by 33% of store managers. There was no variance in opinion between conventional and upscale discounters, with 32% of store managers in both classes of chains naming Bic as a top stationery brand.

Papermate, the No. 3 top brand, with mentions by 17% of all store managers, also got similar responses by both conventional and upscale discounters. Parker, named by 10% of store managers, was more popular among upscale chains, with mentions by 14% of managers, than among conventional chains, where it was named by 9% of managers.

American Greetings was especially popular among upscale chains, where it was named by 20% of managers. Even Ambassador, a division of Hallmark, mentioned by only 3% of conventional chain managers, was named by 9% of managers at upscale chains.

Crayola, the sixth most often cited brand, was clearly more highly recognized at conventional chains, with mentions by 9% of managers, than at upscale chains, where only 2% of managers polled pegged the brand as a top 10 best seller.

Rounding out the five writing instrument brands were Scripto and Sheaffer, Nos. 7 and 9 on the list. Scripto was the preferred writing instrument brand in both conventional and up-

(Continued on page 147)

Growth Regions

South: 1%

In stationery, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the South—1%.

Source: DSN/Leo J. Shapiro & Associates

Stationery

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Mead	44%	40%	53%
Bic	33	32	32
Papermate	17	16	17
Parker	10	9	14
American Greetings	9	5	20
Crayola	7	9	2
Scripto	6	5	9
Ambassador	4	3	9
Sheaffer	4	4	3
Stuart Hall	3	2	5

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Mead	18%	69%	25%	73%
Bic	29	32	40	55
Papermate	22	13	23	22
Parker	10	3	—	7
American Greetings	2	—	10	23

Source: DSN/Leo J. Shapiro & Associates

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Mead	21%	44%	53%	49%
Bic	23	26	30	58
Papermate	21	17	13	18
Parker	6	5	17	12
American Greetings	5	7	16	7
Crayola	2	4	10	13
Scripto	5	6	8	4
Ambassador	—	4	6	6
Sheaffer	7	3	6	—
Stuart Hall	3	3	4	—

Source: DSN/Leo J. Shapiro & Associates

Stationery top brands cover a range of items like filler paper, writing instruments and home office supplies. At Gemco, Rowland Heights, Calif., the stationery assortment includes top brand Crayola.

(DSN photo)

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Mead and Bic Each Capture 2 Regions

(Continued from page 146)

scale discount stores. However, its popularity over Sheaffer was most evident in upscale chains where it was named by 9% of store managers, as opposed to 3% of store managers naming Sheaffer.

Stuart Hall, which manufactures stationery and school, home and office supplies, took the last spot on the list, with mentions by only 3% of store managers. However, the brand was somewhat more popular in upscale chains, where it was named by 5% of managers, than in conventional discount stores, where it received citations from only 2% of managers.

In the regional breakout, Mead was the most often named brand in the South and North Central regions, but Bic was mentioned most often in the Northeast and Western regions.

In fact, Bic experienced the highest percentage of citations by any region, with 58% of store managers in the West naming it a top brand. Mead received the second highest percentage of citations, with mentions by 53% of managers in the North Central region.

Mead was also notable in the regional breakout by the wide discrepancy between the percentage of mentions it received in the Northeast—21%—which was comparatively weak vs. its strength in the other regions.

Differences in the strength of the Mead brand were equally dramatic in the breakout of responses at four major chains.

Mead was mentioned by 73% of store managers at Target and by 69% of managers at Wal-Mart. Yet, at Zayre, the brand was mentioned by only 25% of store managers polled, while an even smaller percentage of managers at K mart, 18%, cited Mead as a top brand.

In fact, at K mart, Mead came out third in percentage of mentions, past Bic and Papermate.

At Zayre, Bic was named the No. 1 brand, with mentions by 40% of store managers. The percentage of mentions of Mead and the chain's No. 3 brand, Papermate, were separated by only two percentage points.

At Target, although Mead was the clear-cut brand leader, Bic received strong recognition, with mentions by 55% of store managers.

Conair Wins 3 Regions, Clairol Gets 1

(Continued from page 112C)

skeltered picture 'emerges when looking at brand preferences on a chain by chain basis.

For instance, 72% of K mart managers and 62% at Zayre cited Conair as a top brand, but its popularity falls off markedly at Wal-Mart, 48%, and Target, 24%.

Less dramatically, Clairol was mentioned most often by Target managers, 43%, and 40% at K mart, but was named by only 27% of Zayre managers and 17% at Wal-Mart.

Norelco was cited by more than six Target managers in 10, but only about two K mart managers in 10. General Electric appeared to have more consistent support, though Remington, which rounds out the top five, was cited as a top brand by only 13% of Zayre store managers.

Looking at store manager brand preferences on a regional basis, it appears that many of the top brands have solid national followings. As an example, Conair is favored by 47% of discount store managers in the North Central part of the country, and finds its floor at a still hefty 34% level of mention in the West.

In contrast, Clairol is most popular in the West but bottoms at a relatively soft 22% ranking in the South.

Norelco was strongest in the North Central region, at 45%, but didn't fare nearly as well at 17% in the Northeast.

Adding It Up

Region-by-region measures reflect fairly consistent support nationwide for virtually all the rest of the top 10. Remington, for example, ranges from 15% in the South to 25% in the West; Vidal Sassoon from 9% in the Northeast to 20% in the North Central region.

Regional findings appear to underscore the strength of Conair as the leading brand. It practically swept the map, taking the Northeast with a 40% citation level as a top brand, the South at 43%, North Central at 47%, tough finishing third in the West at 34%.

Personal Care

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Conair	40%	43%	47%	34%
Clairol	38	22	39	47
Norelco	17	30	45	40
General Electric	35	40	30	21
Remington	16	15	19	25
Vidal Sassoon	9	12	20	19
Windmere	3	14	8	11
Sunbeam	3	5	14	10
Gillette	14	7	6	—
Black & Decker	11	9	6	—

Source: DSN/Lee J. Shapiro & Associates

The No. 2 brand, Clairol, won the West at 47%, was narrowly beaten in the Northeast, and was favored by many in the South and North Central parts of the country, according to survey findings.

Chemicals

(Continued from page 136)

named Comet as a top brand, followed by 8% at K mart and Wal-Mart and 6% at Zayre.

Regional preferences also became clear when manager responses were grouped by area of the country. For instance, Procter & Gamble citations were greatest in the South, 41%, and weakest in the Northeast, 25%.

Tide was mentioned most often by managers in the North Central part of the country, 42%, and least by discounters in the Northeast, 13%. Windex also had its greatest support from North Central discounters, 20%, but lagged in the West at 7%.

Figures Analyzed

The next four brands in turn—Downy, Comet, Cheer and Vanish—each were named most frequently by discounters in the North Central and Western parts of the nation. They all had consistently lower scores among managers polled in the South and Northeast.

Rounding out the top brands list, Dawn, in the eighth position, had an uncharacteristically high frequency of mention among discount store managers in the South—8%. At the same time, virtually none in the West named Dawn as a top brand.

Mr. Clean drew a similar profile in the West, though it was cited by a fairly balanced number of managers in the Northeast, North Central and South regions.

It's not surprising that few discount managers reported increases in the number of household chemicals brands carried this year, considering the dominance of the Procter & Gamble family of brands. In fact, none among discount store managers polled in the Northeast and West said any such gain occurred. In the South and North Central regions, however, 5% of managers said they're carrying more brands in the department now.

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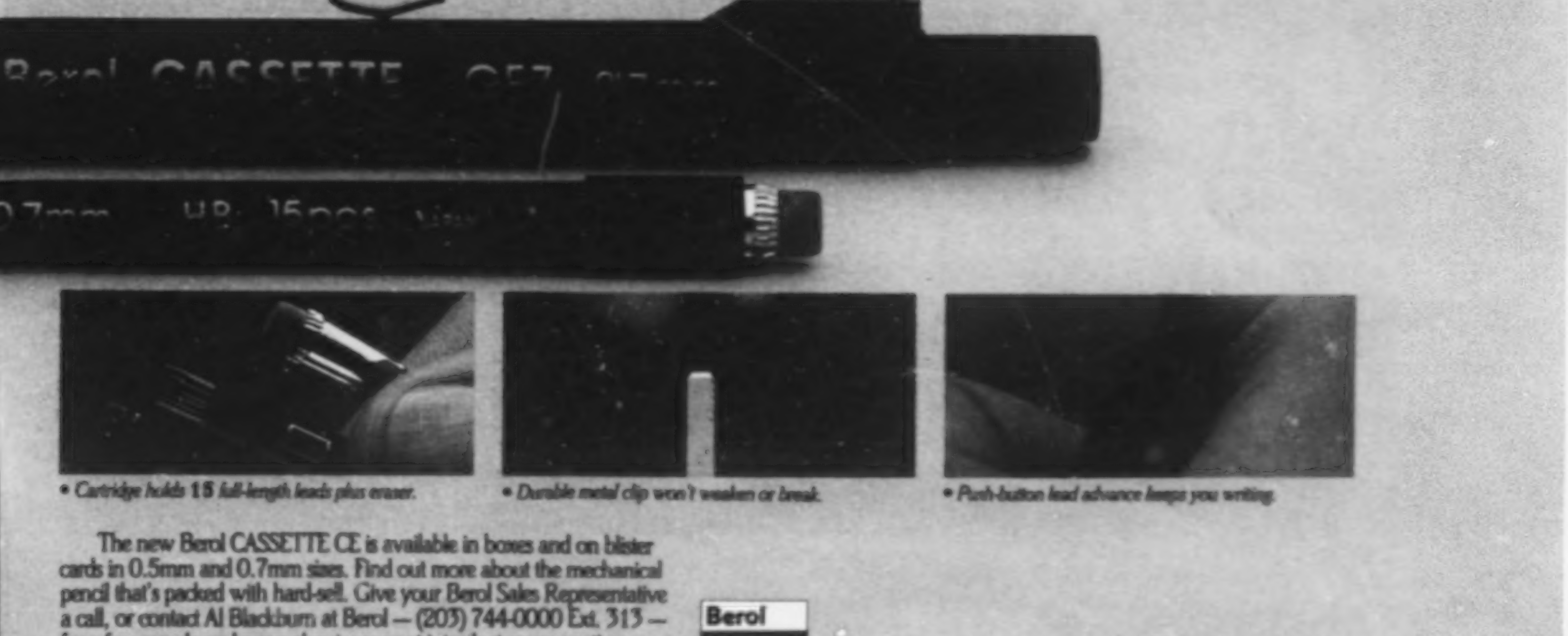

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Candy and Snacks Rack Up Tasty Totals

Nationwide DSN Report

Discounters crave sweets. That's the clear conclusion of top brand survey findings in the food/candy/snacks department.

Candies and snacks brands held the six most favored positions among managers polled.

Cookie and cracker brand Nabisco nailed down the No. 7 spot, while soft drinks, Coke and Pepsi, tied Keebler for eighth.

The popularity of candies and snacks among discount store managers polled is evident by the double-digit scores registered by all 10 food brands. Survey findings indicate that discounter food assortments are dominated by candies, chips, nuts, cookies, crackers and soft drinks.

Hershey was named the top brand by nearly half of all discounters polled. Its 45% overall rating was comparably strong at conventional stores and upscalers.

Planters, however, the No. 2 brand overall at 42%, was favored by more upscalers than managers at conventional chains. Upscale store managers named Planters 54% of the time, compared to 38% of conventional discounters.

Mars, an M&M brand, achieved its 39% rating and No. 3 position on the strength of even support from upscalers and conventional managers. However, M&M was a distant sixth, at 24%, a rating that also reflected comparable levels of popularity at both types of chains.

Frito-Lay, the No. 4 brand overall, narrowly edged Brach's, M&M and Nabisco in the opinions of store managers polled. The four brands were separated by a mere five percentage points in frequency of mention, ranging from 22% to 27%. Among these closely bunched brands, however, Frito-Lay was the clearcut leader among upscale discounters, who named it a top brand one time in three.

Keebler, Coke and Pepsi are in a dogfight, rounding out the rest of the top brands list in food/candy/snacks. Each of the three achieved a 10% overall rating by managers polled, and all scored significantly better at ups-

(Continued on page 153)

Food, Candy, Snacks

Top Brands Vary by Type of Outlet

Brands	All Discounters	Conventional Discounters	Upscale Discounters
Hershey	45%	45%	48%
Planters	42	38	54
Mars	39	36	42
Frito-Lay	27	24	33
Brach's	25	28	18
M&M	24	23	28
Nabisco	22	23	19
Keebler	10	9	14
Coke	10	7	19
Pepsi	10	7	16

Source: DSN/Leo J. Shapiro & Associates

How Industry's Top 5 Fare at Chains

Brands	K mart	Wal-Mart	Zayre	Target
Hershey	53%	26%	56%	33%
Planters	36	35	69	62
Mars	43	30	38	39
Frito-Lay	20	28	26	40
Brach's	13	81	17	2

Source: DSN/Leo J. Shapiro & Associates

Growth Regions

▆▆▆▆ Northeast: 8%
▆▆ South: 4%
North Central: 0%
West: 0%

In food, candy and snacks, the most discount store managers citing an increase in the number of brands carried (1985 vs. 1984) were in the Northeast—8%.

Source: DSN/Leo J. Shapiro & Associates

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Candy and Snacks Pack Lots of Weight

(Continued from page 151)

calers than with conventional stores.

In the opinions of managers at upscale chains, Coke was favored most strongly at 19%, followed closely by Pepsi and Keebler. However, conventional discounter managers rated Keebler highest of the three, at 19%.

When examining the popularity of the top five brands at leading chains, almost all rated well at K mart, Wal-Mart, Zayre and Target. However, consistency is another matter.

Hershey, for instance, was named by more than half of K mart and Zayre managers, just one-third at Target and a quarter at Wal-Mart. It copped the No. 1 brand position overall, despite being considered the strongest brand only by K mart managers. Hershey was rated second at Zayre, fourth at Target and fifth at Wal-Mart.

Planters swept Zayre and Target by wide margins, but was a distant second at Wal-Mart and third at K mart.

By comparison, Mars and Frito-Lay had fairly balanced support among these top chains.

Adding It Up

The most striking contrast belonged to Brach's, which was cited by 81% of Wal-Mart managers, and just 2% at Target, as a top brand. Those ratings made Brach's the most popular food/candy/snack brand at Wal-Mart, and the trailer at Target. The brand also finished fifth among Zayre and K mart managers, who named it a top brand less than 1 time in 5.

Looking at the popularity of brands in different parts of the country, no single food/candy/snack brand satisfied all of America's taste buds.

Hershey was first in the North Central and West, but second in the Northeast and South. Mars, the next-leading chocolate brand, topped the Northeast and was second in North Central, but lagged elsewhere. M&M melted in the mouths of even fewer discount managers polled, being named by less than a quarter of managers in each region.

That was good enough in the Northeast to tie Brach's at 24%. For its part, Brach's tied for second in the South, at 36%, but fared less well elsewhere.

The two cookie and cracker brands, Nabisco and Keebler, had vastly different regional profiles, though both were rated highest in the North Central and West. Nabisco topped Keebler in every part of the country.

Top Brands' Performance by Region

Brands	Northeast	South	North Central	West
Hershey	46%	36%	53%	48%
Planters	39	42	47	39
Mars	51	31	48	25
Frito-Lay	13	29	31	31
Brach's	24	36	28	3
M&M	24	26	24	19
Nabisco	16	21	22	27
Keebler	3	7	18	11
Coke	5	9	12	14
Pepsi	4	9	12	12

Source: DSN/*Leo J. Shapiro & Associates*

Candies and snacks are addicting to discounters, who named them as six of the top 10 department brands. Ames, Meriden, Conn., devotes front race track aisles to the high-impulse items. *(DSN photo)*

3 ON THE MONEY.

10
5
Bill Gallo

DISCOUNT STORE NEWS' EXCITING NEW 1985 HOUSEWARES SHOW PACKAGE* LETS YOU REACH YOUR PROSPECTS BEFORE, DURING AND AFTER THE SHOW.

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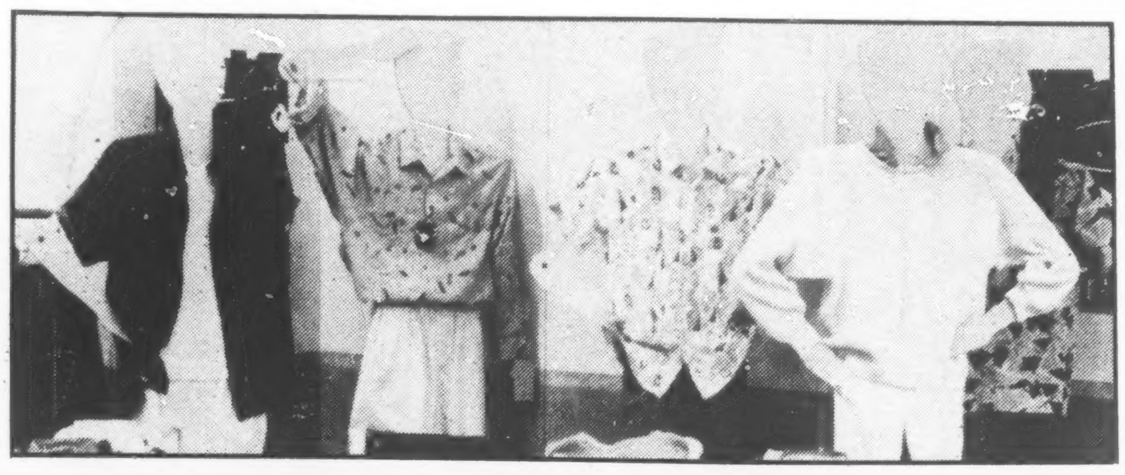


Bright Colors Cheered At MAGIC Show

By KAREN PAXTON

LOS ANGELES — Men's and boys' wear merchandisers found the sparkle they had been seeking at the Men's Apparel Guild in California (MAGIC) show here.

But, for most discount chains sparkle was not all they were after. Buyers asked for and found "at once" shipping for Holiday and '85 and some off-price deals in promotional categories like knit tops for spring '86.

All the brightly colored tropical and floral print shirts with matching printed shorts in lengths varying to just below the knee, abstract graffiti prints and stripes were described as "icing on the cake," by chain merchants.

"This is all spicy and fun, but it's less than 1% of our business," said Steve Jelin, president of the Green Bay, Wis.-based Prange Way. He categorized longer pajama style shorts (jams) in prints to match shirts which were dominant at the show as "the oregano on the pizza."

The meat and potatoes of discounters' spring business will be basic shorts, tennis coordinate sets as an activewear look, knit tops with engineered stripes or award stripes, Hawaiian shirts, basic jeans, twills and painter pants. The key to sales gains will be pricing, merchandisers report.

Translating the California fashion scene to that basic and almost lackluster assortment is a matter of color for spring '86, most chain merchandisers agree.

"I've been pleasantly surprised by the color here," said Gold Circle men's divisional mm Steve Drexler. "There's such a big thrust to brights."

It's not that the vendors are pushing brights, said Drexler; the retailers feel strongly about them. "Business is going 50/50 pastels and brights. Not 80% pastels, the way it seemed the manufacturers had expected."

One reason discount merchants are sold on brights is their success a year ago with Hawaiian shirts. "I think the print thing is exciting," said Joe Ettore, soft lines vp at Jamesway. "Next spring print shirts will be a third of the shirt mix compared with 25% a year ago."

T.G. & Y.'s Chuck Schmidt is also betting on stronger print camp shirt business. "I expect

(Continued on page 9)

Discounters Boost Net to 2.54% In '84-'85, Their Highest Ever

NEW YORK — Discounters turned in a strong performance in 1984-85 despite the seesaw economy, registering 2.54% net earnings after taxes, the highest ever recorded for the industry.

More aggressive merchandising, augmented by a slowdown in the opening of new stores, resulted in record highs being achieved in such areas as average sales per store and per square foot of selling space, and in inventory turnover.

In the face of the uncertain economy, discounters tightened up on expenses across the board. Such costs (measured as a per cent of sales) as total expenses, occupancy expenses, advertising and promotional expenditures, transportation costs and employee benefit charges fell to record lows.

This picture of a resurgent discount industry is evident in the National Mass Retailing Institute's *Operating Results of Self-Service Discount Department Stores, 1948-85*. The annual study was conducted for the NMRI by Cornell University, and includes the Mass Retailers' Merchandising Report on the performance of 36 departments. (*DSN* will carry an analysis on the merchandising report in the next issue.)

The operating study's picture of 31 discounters, running 3,475 stores with sales of $25.1 billion, shows that average volume per store went up 24.2% to $7,504,000; sales per square foot of selling space increased 13.1% to $156.99; and volume per square foot of total store area went up 11.6% to $127.76.

Turns for owned-department inventories showed a 24.1% jump to 4.33, while stock shortages (at retail) as a percentage of sales had a 35.3% decline to 0.75%, the lowest figure ever in the study.

On the cost side, as a per cent of sales, total expenses dropped 0.3% to 23.65%. Occupancy expenses fell 1.6% to 5.44%, advertising and promotional costs declined 1.3% to 2.20%, transportation expenditure slipped 9.7% to just 0.28% and employee benefit charges plunged 20.7% to 1.84%.

Besides these record results, the figures for such other measurements as cumulative markup, gross margins, buying and merchandising expenses and store operating expenditures were in line with past performances, so the total impact of the sharper merchandising and tighter controls was an overall strong bottom line.

Cumulative markup (as a percentage of original retail) slipped only 0.5% to 36.31%, still one of the highest figures in the past eight years; gross margin (of owned sales) was 29%, a drop of only 0.6%.

(Continued on page 34)

Study Tracks 26 Identical Chains

	Per Cent of Sales	
	1983-84	1984-85
Number of (Identical) Firms	26	26
Gross Margin	28.54	28.12
Leased Department Income	0.49	0.44
Gross Income	29.03	28.56
Total Expenses	23.52	23.32
Net Operating Profit	5.51	5.24
Other Income or Deductions	– 0.44	– 0.33
Earnings Before Income Taxes & LIFO	5.06	4.91
LIFO Reserve	0.21	0.00
Earnings Before Income Taxes	4.85	4.91
Federal & State Income Taxes	2.16	2.18
Net Earnings After Taxes	2.69	2.73

Source: NMRI

NMRI study breaks out results for 26 identical discounters, noting such tracking is a more accurate reflection of industry trends.

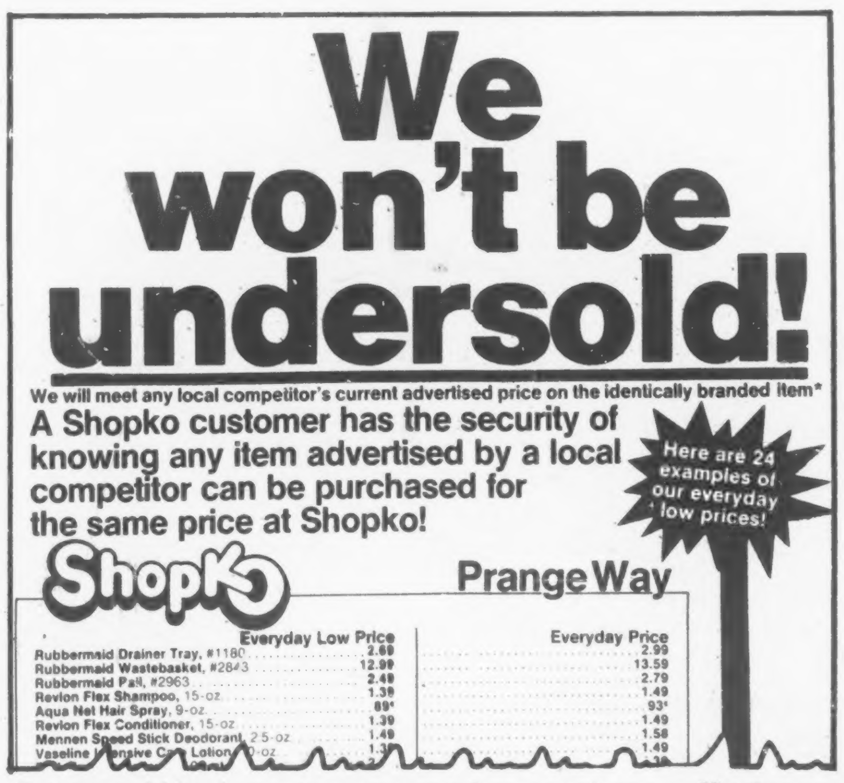
Prange Way Battles Own Former Image and ShopKo

GREEN BAY, Wis. — Prange Way is waging an aggressive new image war—on its former self and on market powerhouse ShopKo.

The 20-unit chain has embarked on several new programs, trying to weave its upscale direction of the past few years into a more value-oriented, sharply priced operation. The key shift, to an everyday low pricing policy, has triggered an image/price war with dominant discounter ShopKo, which accounts for almost half of the market's retail sales. Prange Way, K mart and Kohl's Department Stores each own about 14%.

Prange Way's initial barrage of ROP advertising compared

(Continued on page 34)



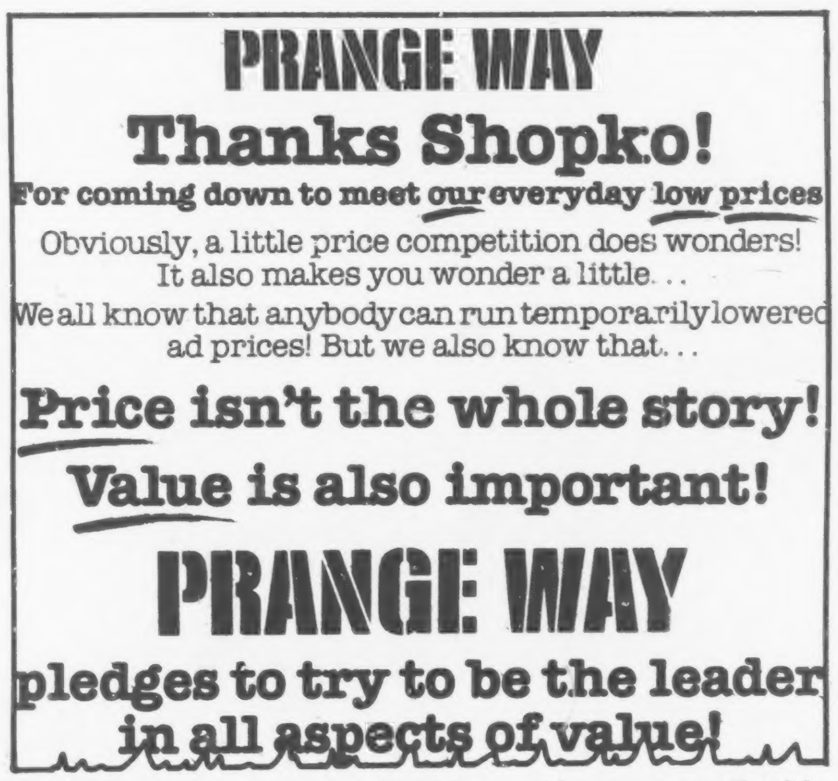
We won't be undersold!

We will meet any local competitor's current advertised price on the identically branded item*

A Shopko customer has the security of knowing any item advertised by a local competitor can be purchased for the same price at Shopko!

Here are 24 examples of our everyday low prices!

	ShopKo Everyday Low Price	Prange Way Everyday Price
Rubbermaid Drainer Tray, #1180	2.69	2.99
Rubbermaid Wastebasket, #2843	12.99	13.59
Rubbermaid Pail, #2963	2.49	2.79
Revlon Flex Shampoo, 15-oz	1.39	1.49
Aqua Net Hair Spray, 9-oz	89¢	93¢
Revlon Flex Conditioner, 15-oz	1.39	1.49
Mennen Speed Stick Deodorant, 2.5-oz	1.49	1.58
Vaseline [illegible] Lotion, [illegible]-oz	1.3	1.49



PRANGE WAY
Thanks Shopko!
For coming down to meet our everyday low prices
Obviously, a little price competition does wonders!
It also makes you wonder a little...
We all know that anybody can run temporarily lowered ad prices! But we also know that...
Price isn't the whole story!
Value is also important!
PRANGE WAY
pledges to try to be the leader in all aspects of value!

Prange Way's new aggressive posture, offering everyday low pricing, resulted in an "image war" with market leader ShopKo during the chains' back-to-school promotions. ShopKo refused to be undersold; Prange Way announced there's another price-oriented retailer in town.

IN BRIEF

- **ZAYRE CORP. HAS** agreed to purchase Metro Cash & Carry Wholesale, a three-unit membership warehouse club chain in the Chicago area. Once the acquisition is completed, the units will be operated by Zayre's BJ's Wholesale Club division, under the BJ's name. BJ's president Mervyn Weich said the company plans eventually to operate five or six units in the Chicago market.
- **CONSUMERS DISTRIButing** (U.S.) has unveiled its first expanded prototype showroom, a 10,500-sq.-ft. unit in Philadelphia that devotes 4,692 sq. ft. to selling space. Set to open next month in Peabody, Mass., is a 12,200-sq.-ft. store (5,520 sq. ft. selling).

Licensing Is Still

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Housewares Show Preview: Pp. 15-20

Among the new items readied for next week's Housewares Show are several in the growth categories of electrics, microwaves, health care and floor care.

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